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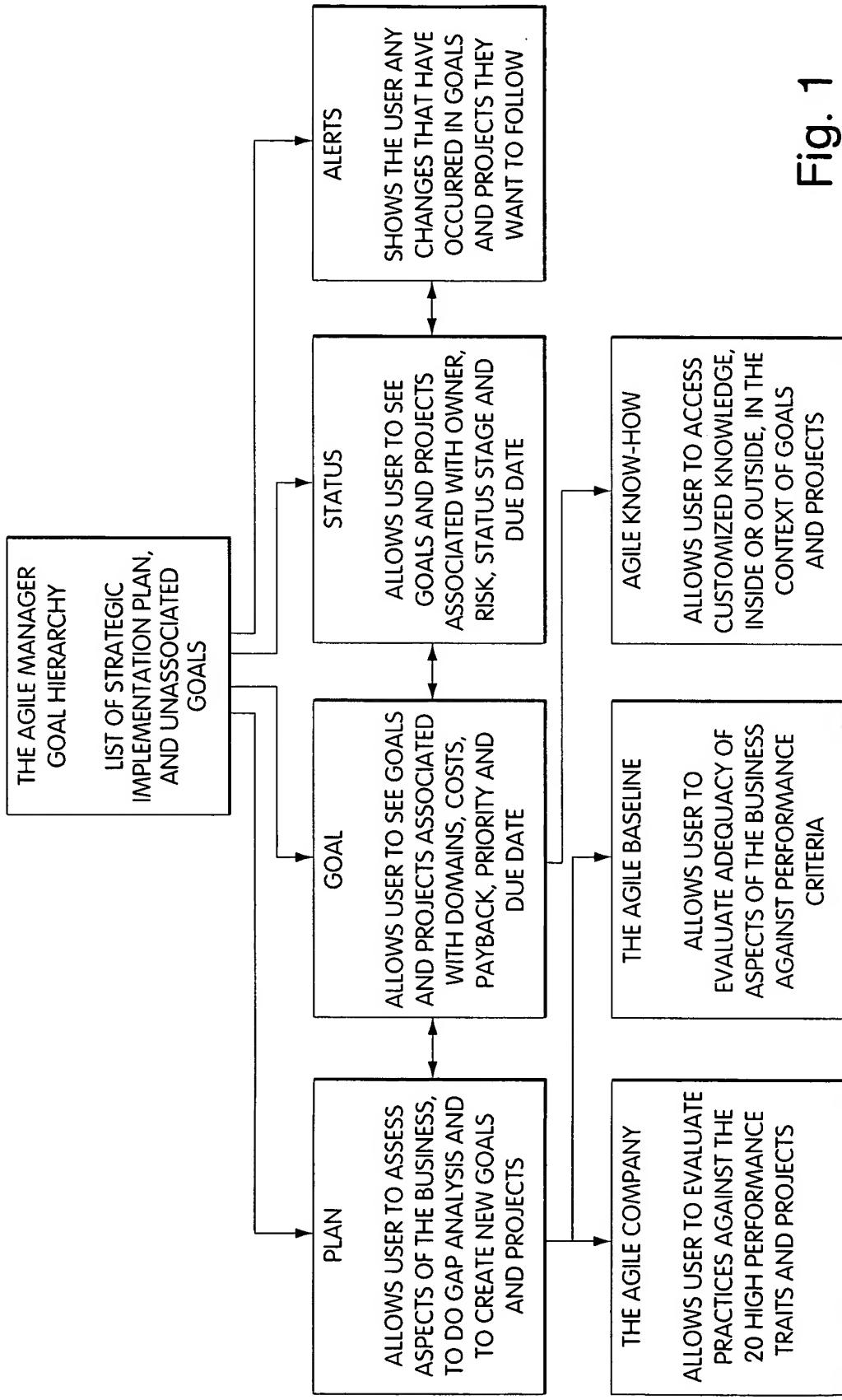


Fig. 1

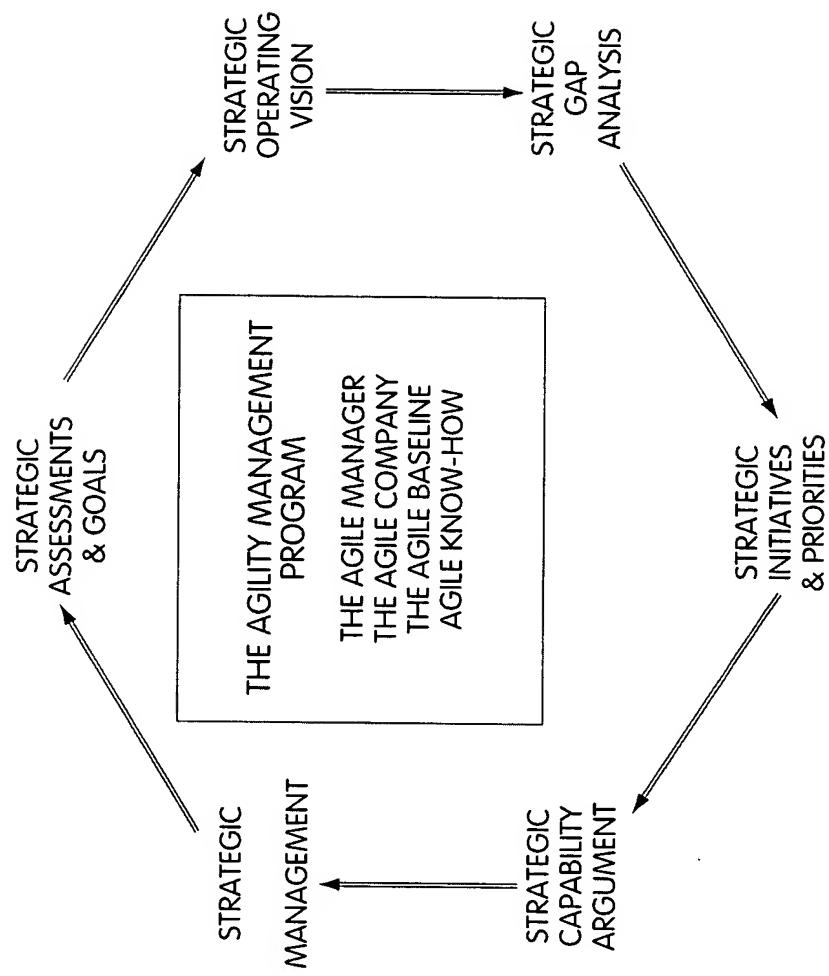


Fig. 2

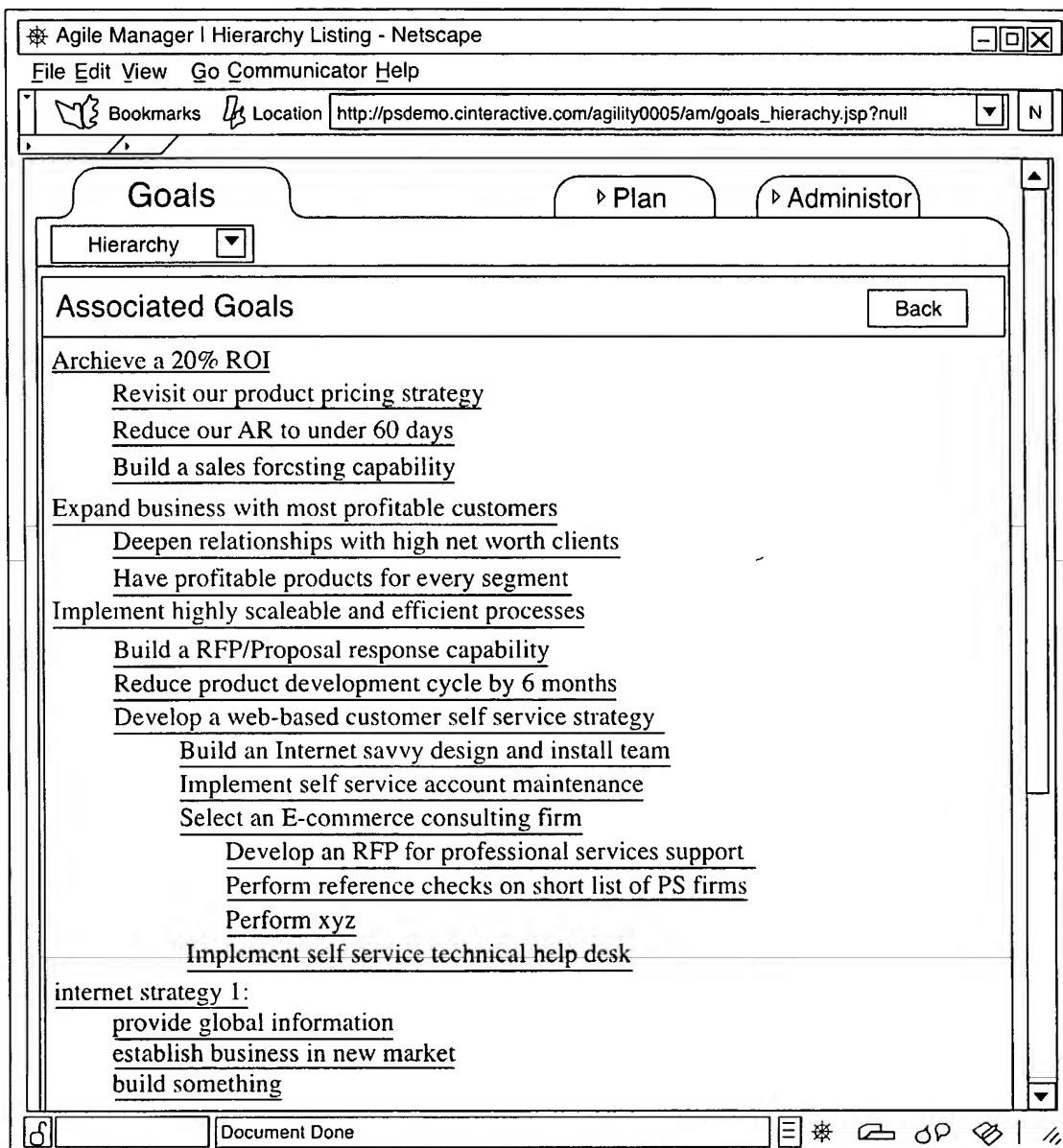


Fig. 3

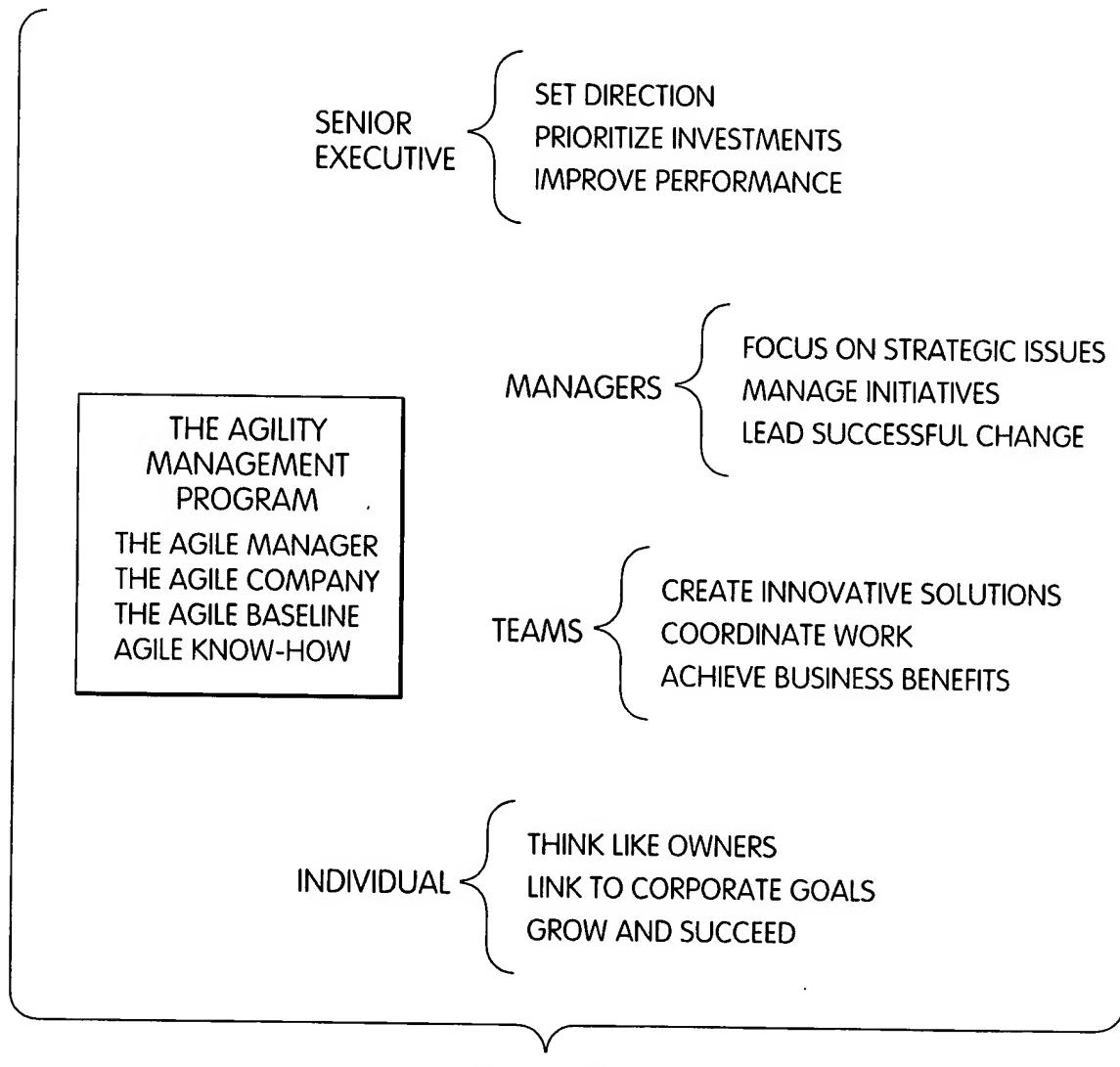


Fig. 4

RESEARCH BASED DIAGNOSTICS REDUCE
ORGANIZATIONAL BARRIERS

ENTERPRISE	MANAGEMENT TEAM
<ul style="list-style-type: none"> • "HARD WIRED" TO CUSTOMER NEEDS/BEHAVIORS • INFECTIOUS, IMPROVEMENT-DRIVEN LEADERSHIP • VISIONARY LEADERSHIP WITH CRYSTAL CLEAR COMMUNICATION • EMPLOYEES ACT LIKE OWNERS • ACTION FOCUSED INNOVATION/RISK TAKING REWARDED • VALUE BASED DECISION MAKING AT LOWEST LEVEL • ADAPTIVE CULTURE, REVOLUTIONARY WHEN NECESSARY • DRIVEN TO EXCEL; "GOOD ENOUGH NEVER IS" • RELENTLESS COMMITMENT TO LOWER COST AND HIGHER QUALITY • BOUNDARYLESS, BY WELL MANAGED STRUCTURES • TIME/RESOURCES FOCUS ON HIGH VALUE INITIATIVES • SYSTEMATIC, OPPORTUNISTIC STRATEGIES THAT ADAPT • CONCENTRATE WHERE THE BUSINESS LEVERAGE IS • EXACTING EXECUTION WITH RELIABLE RESULTS • INFORMATION/KNOWLEDGE ACCESSIBLE AS NEEDED 	<ul style="list-style-type: none"> • FOCUSING ON THE HIGHEST GAIN STRATEGIC INITIATIVES: <ul style="list-style-type: none"> - CREATING A PORTFOLIO OF HIGH LEVERAGE INITIATIVES - REPRIORITIZING THE PORTFOLIO AS THINGS CHANGE - REVIEWING NEW/OLD INITIATIVES FOR ROI IMPACT • REDUCING ORGANIZATIONAL BARRIERS TO SUCCESS: <ul style="list-style-type: none"> - DETERMINING FACTORS CRITICAL FOR SUCCESS - IDENTIFYING KEY RISKS TO BE MANAGED PROACTIVELY - MAKING ADJUSTMENTS TO ELIMINATE KEY BARRIERS • APPLYING MANAGEMENT TALENT ON THE RIGHT THINGS: <ul style="list-style-type: none"> - REINFORCING STRATEGIC GOALS USING STRUCTURED COMMUNICATION - GETTING SUBSTANCE FROM MANAGEMENT MEETINGS - FOCUSING MANAGEMENT ATTENTION ON THE HIGH LEVERAGE ITEMS • EQUIPPING LEADERS TO SUCCEED: <ul style="list-style-type: none"> - LEARNING TO THINK LIKE OWNERS - GETTING THE MOST FROM INTERDISCIPLINARY TEAMS - MANAGING PROJECT RISK TO VALUE

Fig. 5

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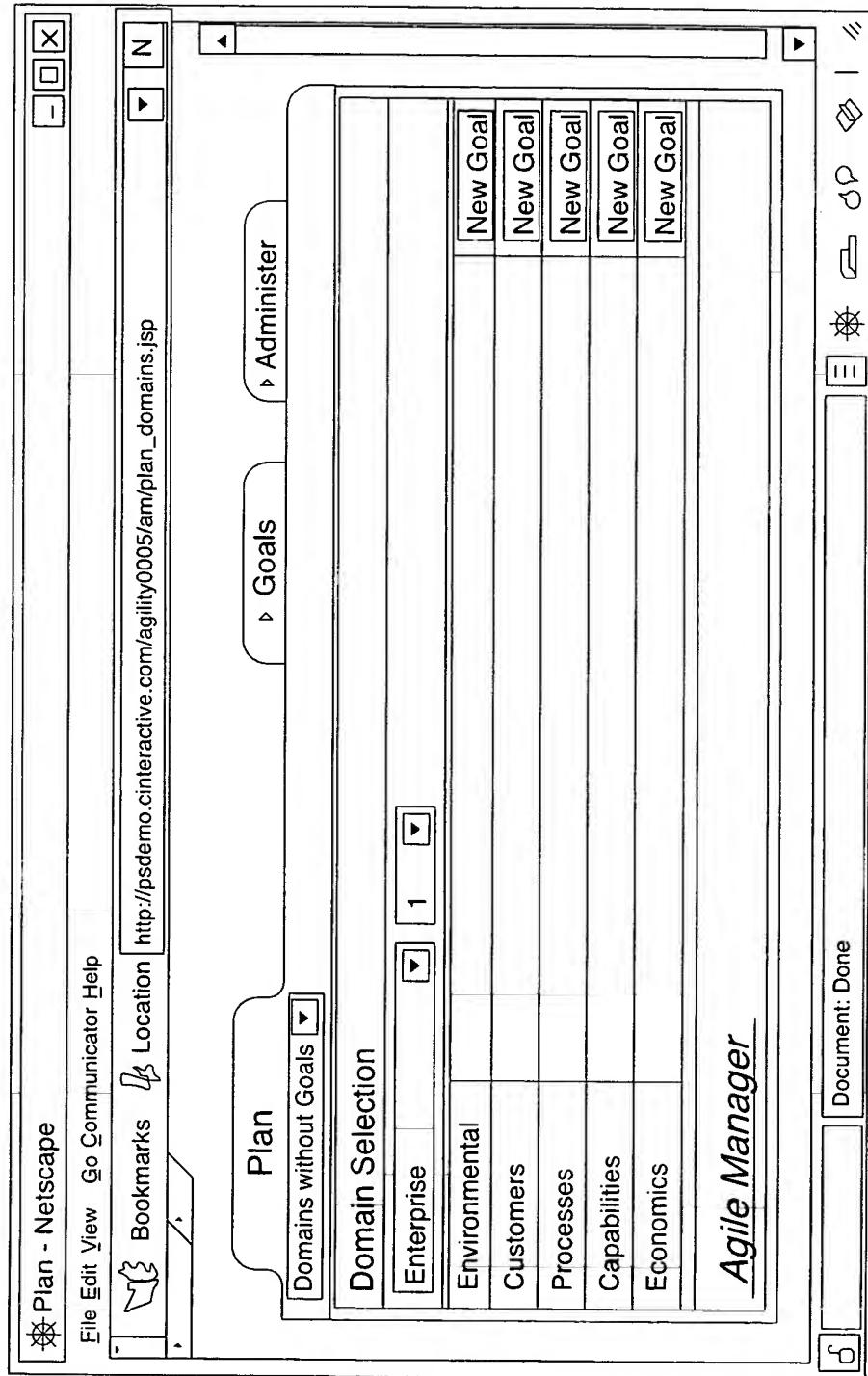


Fig. 6

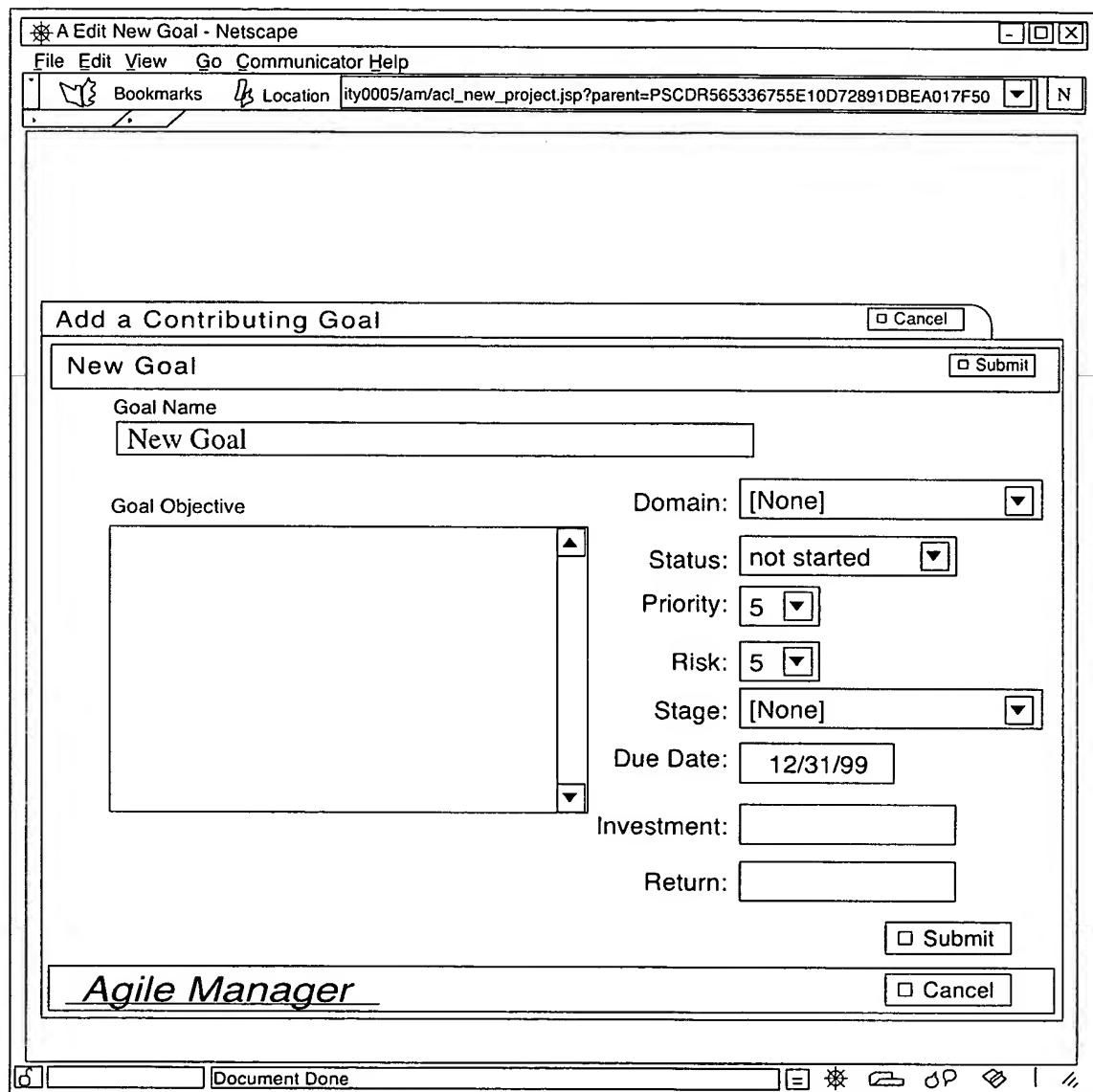


Fig. 7

Plan		Goals		Administrator	
Domains without Goals ▶		Depth ▶		New Goal	
Domain Selection					
Enterprise	▶	▶	Depth ▶	New Goal	New Goal
Environmental				New Goal	New Goal
Market Trends				New Goal	New Goal
Competitors				New Goal	New Goal
Technical Innovation				New Goal	New Goal
Regulatory				New Goal	New Goal
Customers				New Goal	New Goal
Relationships				New Goal	New Goal
Products				New Goal	New Goal
Services				New Goal	New Goal
Processes				New Goal	New Goal
Core Processes				New Goal	New Goal
Business Acquisition				New Goal	New Goal
Business Development				New Goal	New Goal
Product Development				New Goal	New Goal

Fig. 8

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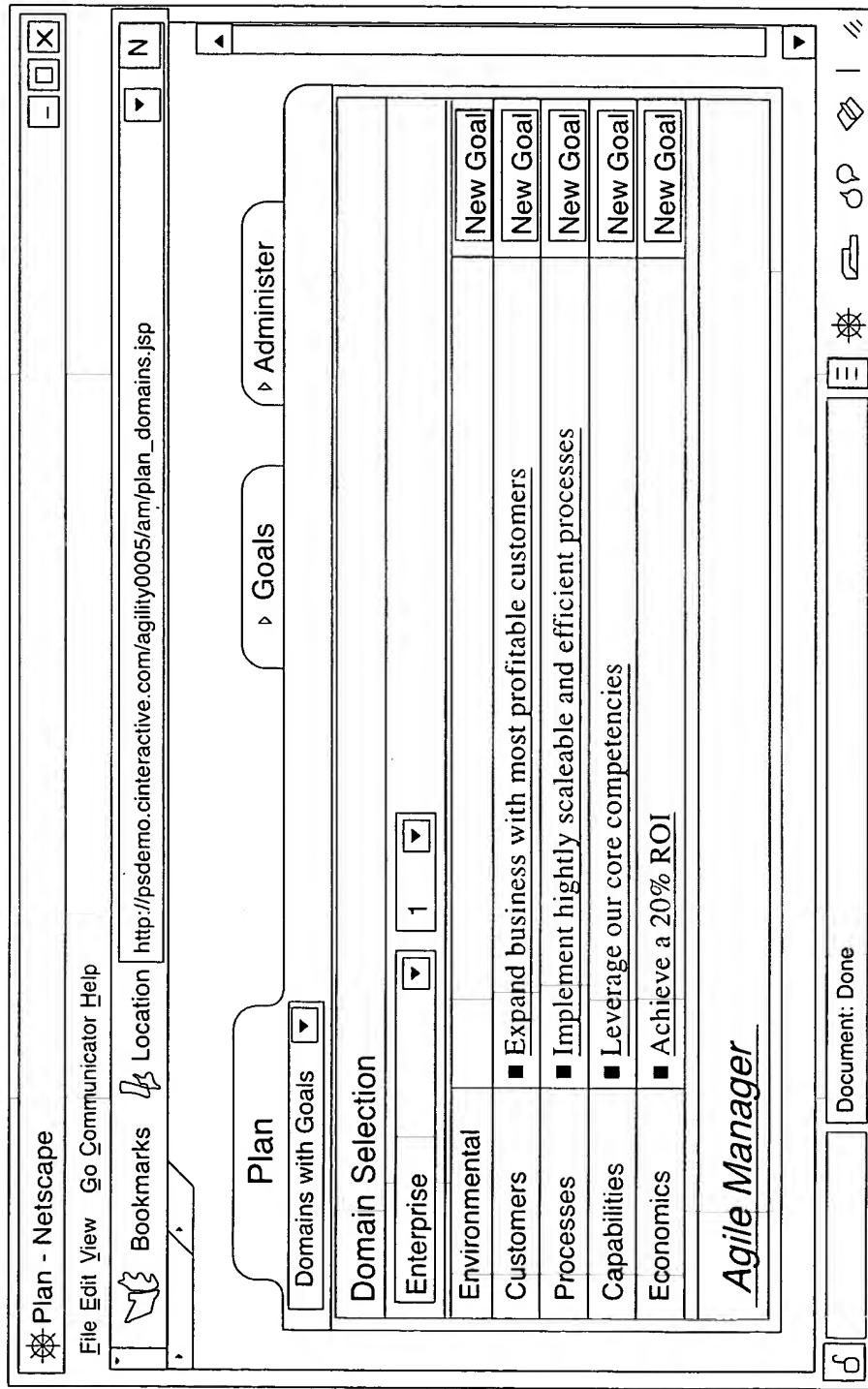


Fig. 9

10/57

Values

Title			Business development assesment
Subtitle			current situation vs. desired state
Show Average		Top Value	Number of
1 points		7	6
Average	Value	Label	
5	3	business people vs. just sales people	
6.5	2.5	sell solutions not just products	
7	4	customer vs. internally focused	
6	3.5	business makers vs. order takers	
5	4	profitability vs. sales focused	
6	4.5	deal well at senior vs. just technical level	
5.5	4	world class vs. unacceptable service	
7	3	build value based client relationships	
0	0		
0	0		

Animation

Spin Rate

84

Increment

3

OK

Cancel

Clear

Fig. 10

11/57

Business development assessment
current situation vs. desired state

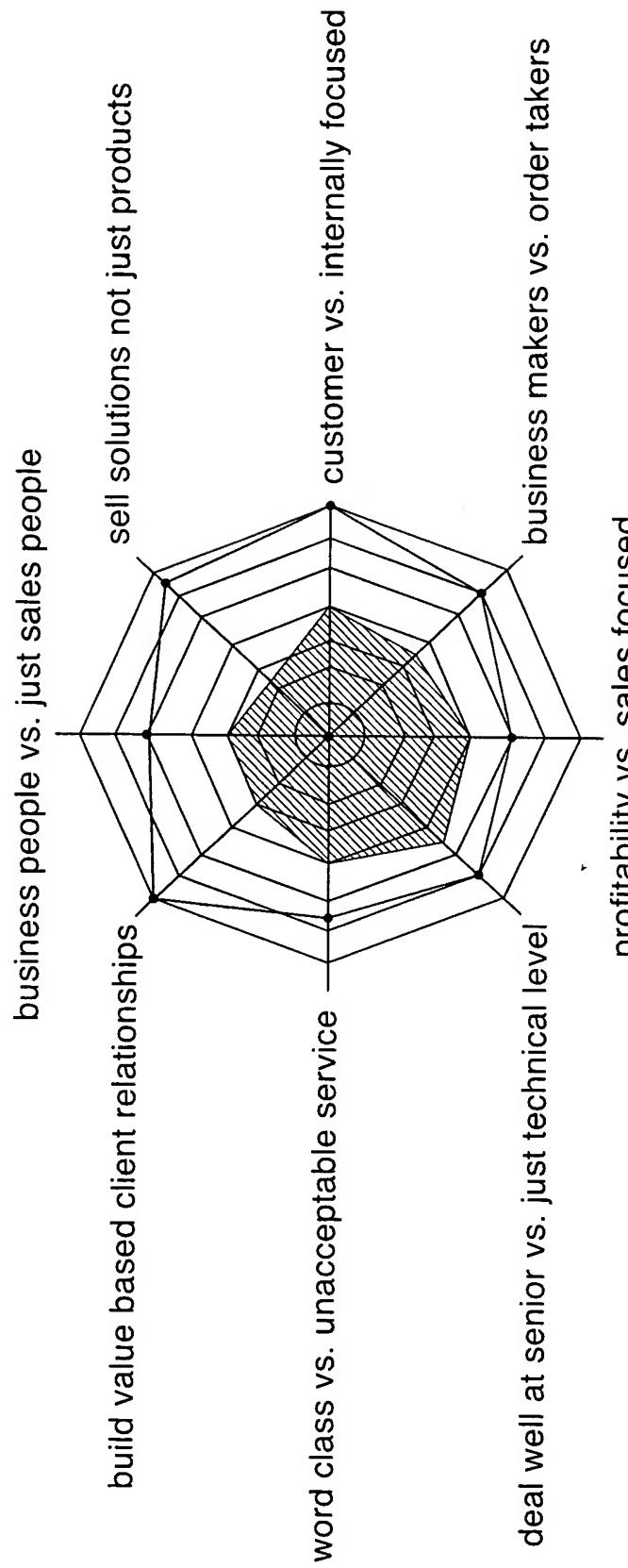


Fig. 11

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Agile Manager | Act | Gap Analysis - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /act_gaps.jsp?domain=&depth=depth&proj=PSCDB565336755E10072391DBEA017F N

Act ▶ Goals ▶ Plan ▶ Administer

Gap Analysis

Expand business with most profitable customers

Cross sell and up sell our products to our existing client base from a position of strength.

Enterprise Depth

Domain	Contributing Goal	Actual/Desired	Gap	Add
Environmental				Add
Market Trends				Add
Competitors				Add
Technical Innovation				Add
Regulatory				Add
Customers				Add
Relationships	<u>Deepen relationships with high net worth clients</u>	10/10	0	Add
Products	<u>Have profitable products for every segment</u>	6/10	4	Add
Services				Add
Processes				Add
Core Processes				Add
Product Development				Add
Business Development				Add

Document Done

Fig. 12

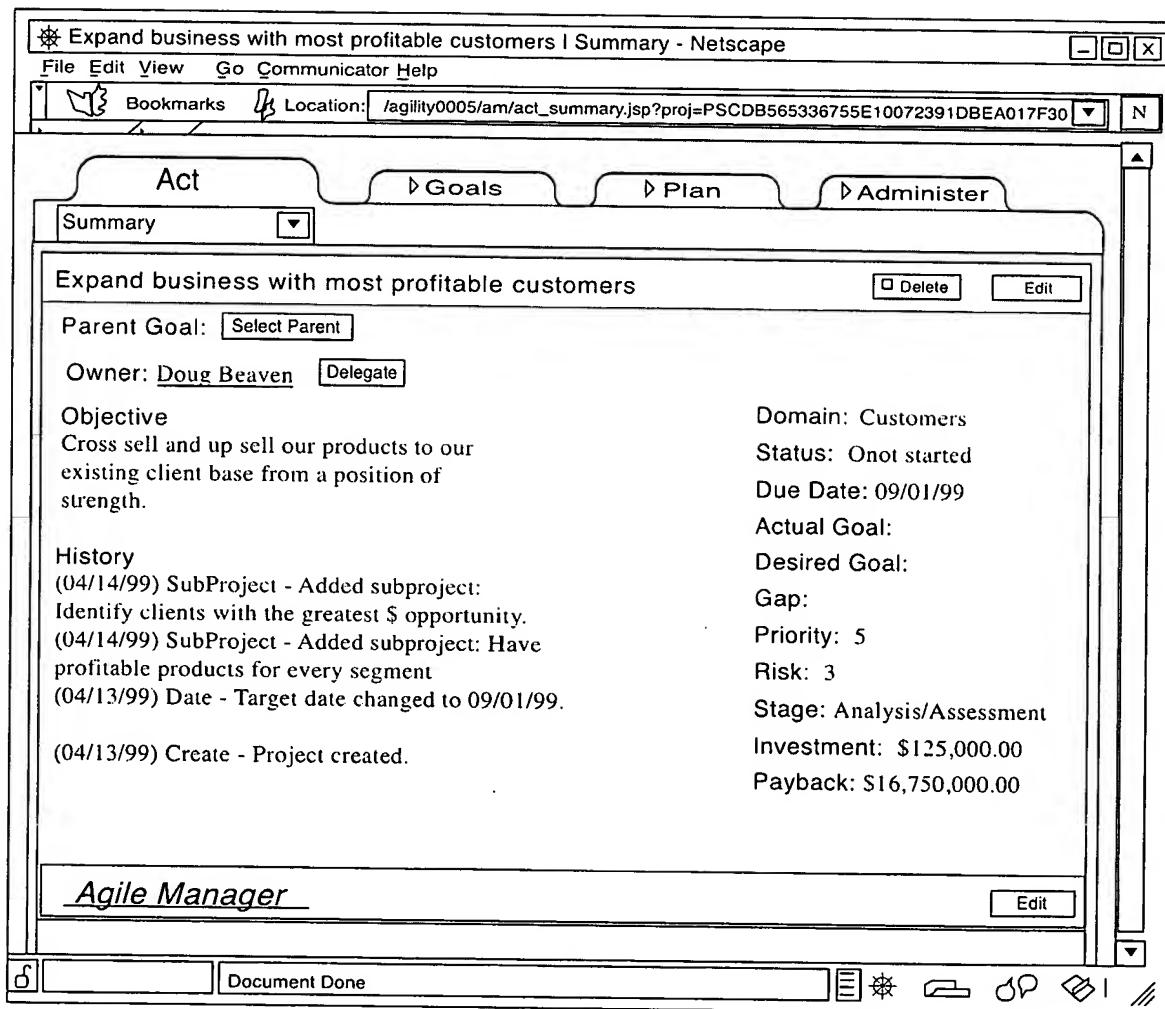


Fig. 13

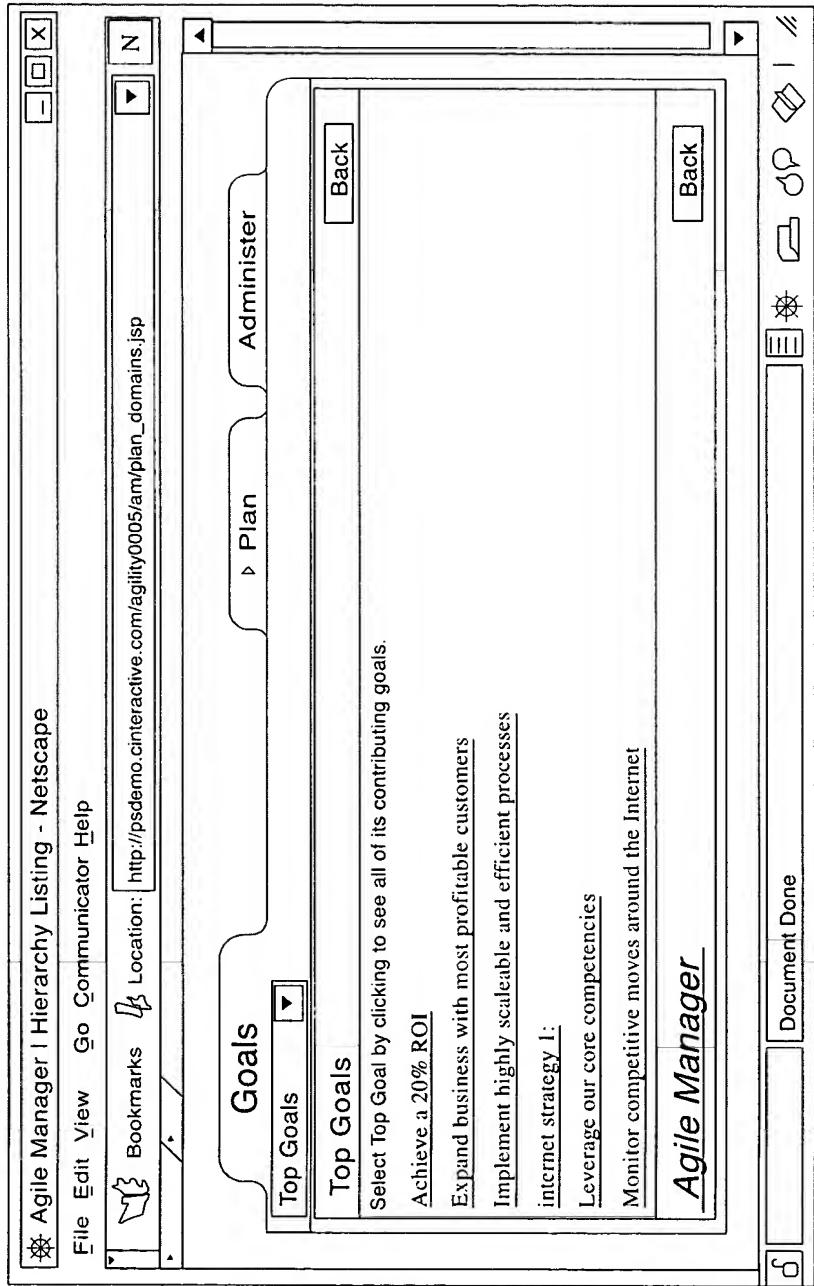


Fig. 14

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View Contributing Goals

Show Columns for: Priority ▾

Administrator

Plan

Goals

[Select] ▾

Expand business with most profitable customers	Cost	Payback	Priority	Due
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Have profitable products for every segment	75,000	250,000	5	33w
Top Goal Total:	\$825,000.00	\$5,250,000.00		
<i>Agile Manager</i>				

Fig. 15

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals Plan Administrator

[Select]

View All Goals show Columns for: Domain

	Cost	Payback	Priority	Due
Environmental				
New Goal	-	-	5	-
Competitors				
<u>Find new company or spin off threats</u>	5,000	50,000	5	10w
<u>Monitor competitive moves around the Internet</u>	5,000	50,000	3	8w
Technical Innovation				
<u>new internet strategy</u>	-	-	5	-
Customers				
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Increase visibility</u>	-	-	5	-
Relationships				
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Understand recent competitive wins</u>	1,000	10,000	5	4w
Products				
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
Services				
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w

Document Done

Fig. 16

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select] ▾

View All Goals

show Columns for: Priority ▾

	Cost	Payback	Priority	Due
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Implement highly scaleable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Implement self service technical help desk</u>	85,000	100,000	4	6w
<u>Build a RFP/Proposal response capability</u>	75,000	100,000	4	8w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Build a sales forecasting capability</u>	35,000	100,000	4	12w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w

Document Done

Fig. 17

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select] ▾

View All Goals

Show Columns for: Status ▾

	Risk	Owner	Stage	Status	Due
○ Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1w
○ Develop a web-based customer self service strategy	5	Joe Smith	Requirements Gathering	on track	21w
○ Find new company or spin off threats	5	Doug Beaven	Implement	not started	10w
○ Implement GSTP by yearend	5	Doug Beaven	Analysis/Assessment	on track	34w
○ Implement self service technical help desk	5	Mike Jones	Business Case Development	on track	6w
○ Increase out technology R&D capability	5	Joe Smith	Prototype	not started	34w
○ Increase visibility	5	chris curran	-	not started	-
○ New Goal	5	Doug Beaven	-	not started	-
○ Perform xyz	5	Doug Beaven	-	not started	-
○ Recruit and hire world class industry talent	5	Doug Beaven	Roll-out	on track	34w
○ Reduce our AR to under 60 days	5	Doug Beaven	Implement	off track	8w
○ Understand recent competitive wins	5	Mike Jones	Analysis/Assessment	on track	4w
○ increase auto adjudication rates	5	Doug Beaven	Build	on track	86w
○ internet strategy 1:	5	Doug Beaven	-	not started	-

Document Done

Fig. 18

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals Plan Administrator

[Select]

View All Goals Show Columns for: Priority

	Cost	Payback	Priority	Due
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Reduce Breakeven on New Business</u>	10,000	2,500,000	4	8w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Implement highly scalable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Develope an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	4	21w
<u>Reduce our AR to under 60 days</u>	5,000	150,000	5	8w

Document Done

Fig. 19

View All Goals					
	Risk	Owner	Stage	Status	Due
∅ <u>Have profitable products for every segment</u>	4	<u>Mike Jones</u>	Requirements Gathering	needs attention	33w
∅ <u>Monitor competitive moves around the Internet</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	needs attention	7w
∅ <u>Reduce Breakeven on New Business</u>	4	<u>Doug Beaven</u>	Implement	needs attention	7w
∅ <u>Develop an RFP for professional services support</u>	4	<u>Joe Smith</u>	Retrospective	completed	-4w
∅ <u>Perform reference checks on short list of PS firms</u>	4	<u>Doug Beaven</u>	Retrospective	completed	-4w
∅ <u>Ask clients about our perceived competencies</u>	5	<u>Doug Beaven</u>	Requirements Gathering	not started	1d
∅ <u>Eclipse competition with our e-comm capability</u>	5	<u>Doug Beaven</u>	-	not started	-
∅ <u>Expand business with most profitable customers</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	not started	16w
∅ <u>Find new company or spin off threats</u>	5	<u>Doug Beaven</u>	Implement	not started	9w

Fig. 20

Goals						» Plan	» Administrator
[Select]		show Columns for:				Status	Due
		Risk	Owner	Stage	Status		
	ducts for around the internet	4	Mike Jones	Requirements Gathering	needs attention	33w	
Ø	Reduce Breakeven on New Business	4	Doug Beaven	Analysis/Assessment	needs attention	7w	
Ø	Develop an RFP for professional services support	4	Doug Beaven	Implement	needs attention	7w	
Ø	Perform reference checks on short list of PS firms	4	Joe Smith	Retrospective Review	completed	-4w	
Ø	Ask clients about our perceived competencies	5	Doug Beaven	Retrospective Review	completed	-4w	
Ø	Eclipse competition with our e-comm capability	5	Doug Beaven	Requirements Gathering	not started	1d	
Ø	Expand business with most profitable customers	3	Doug Beaven	-	not started		
Ø	Find new company or spin off threats	5	Doug Beaven	Analysis/Assessment	not started	16w	
Ø	Increase our technology R&D	5	Doug Beaven	Implement	not started	9w	
			Joe Smith	Prototype	not started	33w	

Fig. 21

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Goals					
View Contributing Goals					
Show Columns for: Domain ▾					
Expand business with most profitable customers	Cost	Payback	Priority	Due	
Customers					
Relationships					
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w	
Products					
Have profitable products for every segment	75,000	250,000	5	33w	
Top Goal Total:		\$825,000.00	\$5,250,000.00		
Agile Manager					

Fig. 22

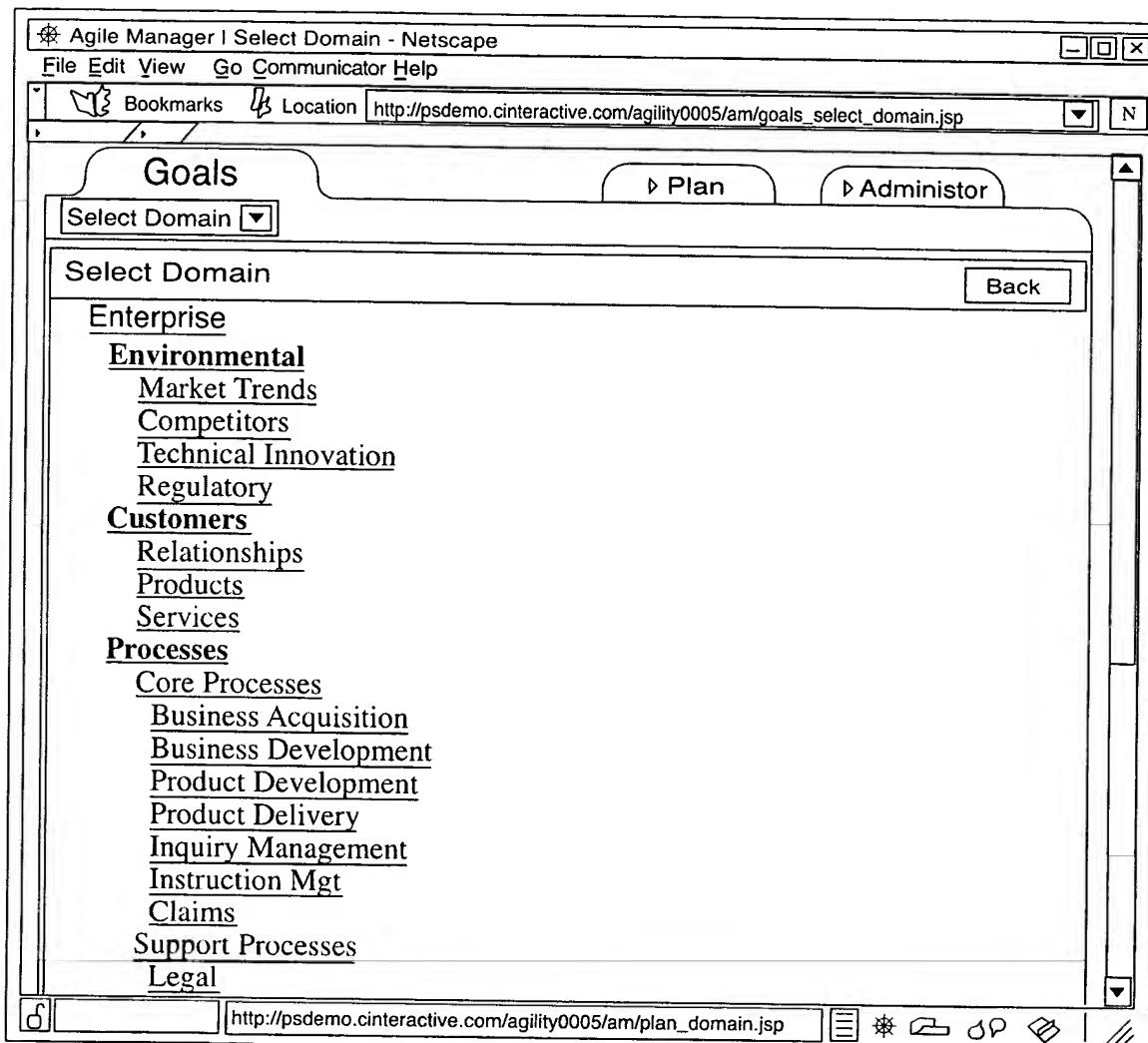


Fig. 23

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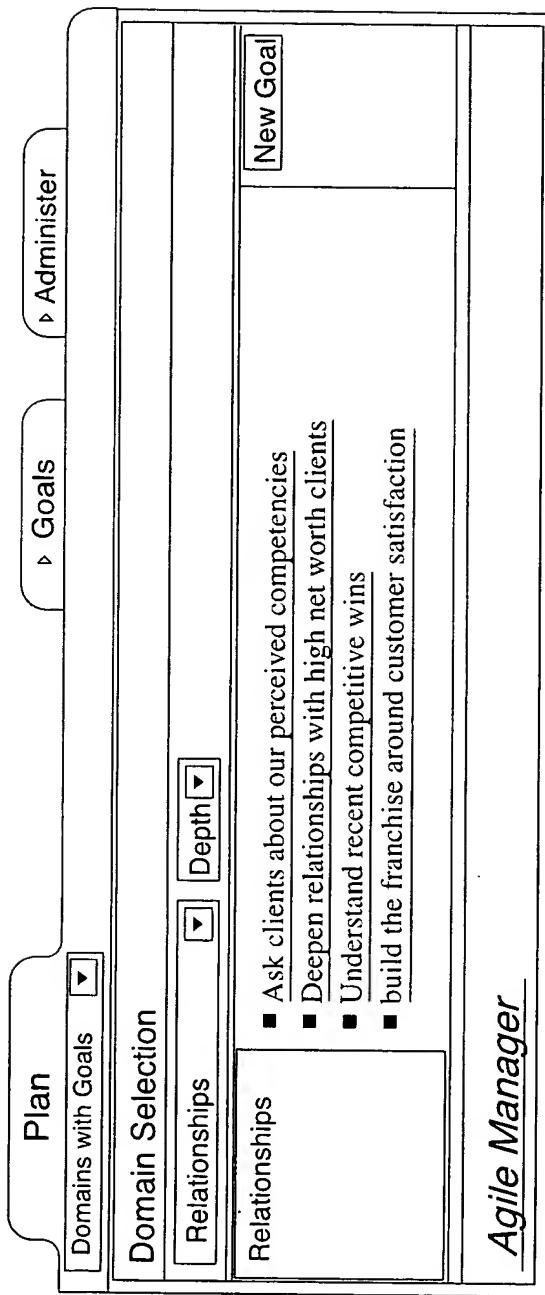


Fig. 24

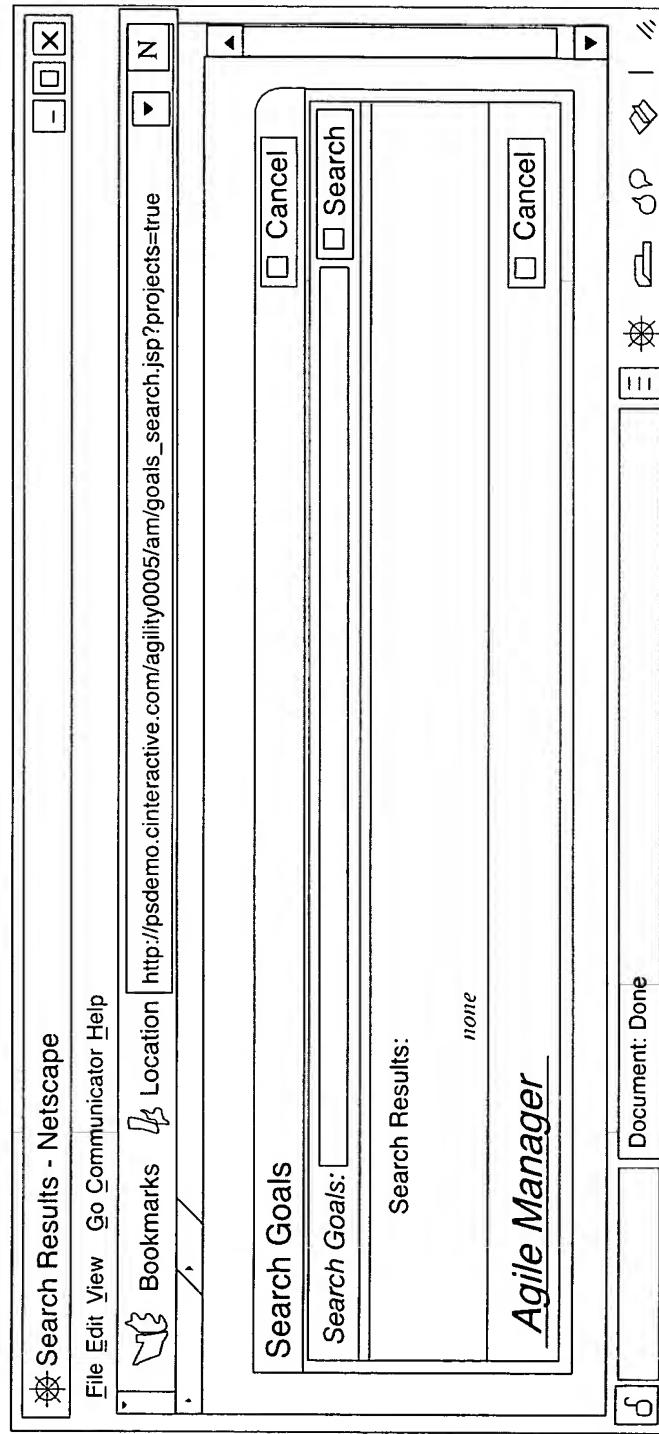


Fig. 25

26/57

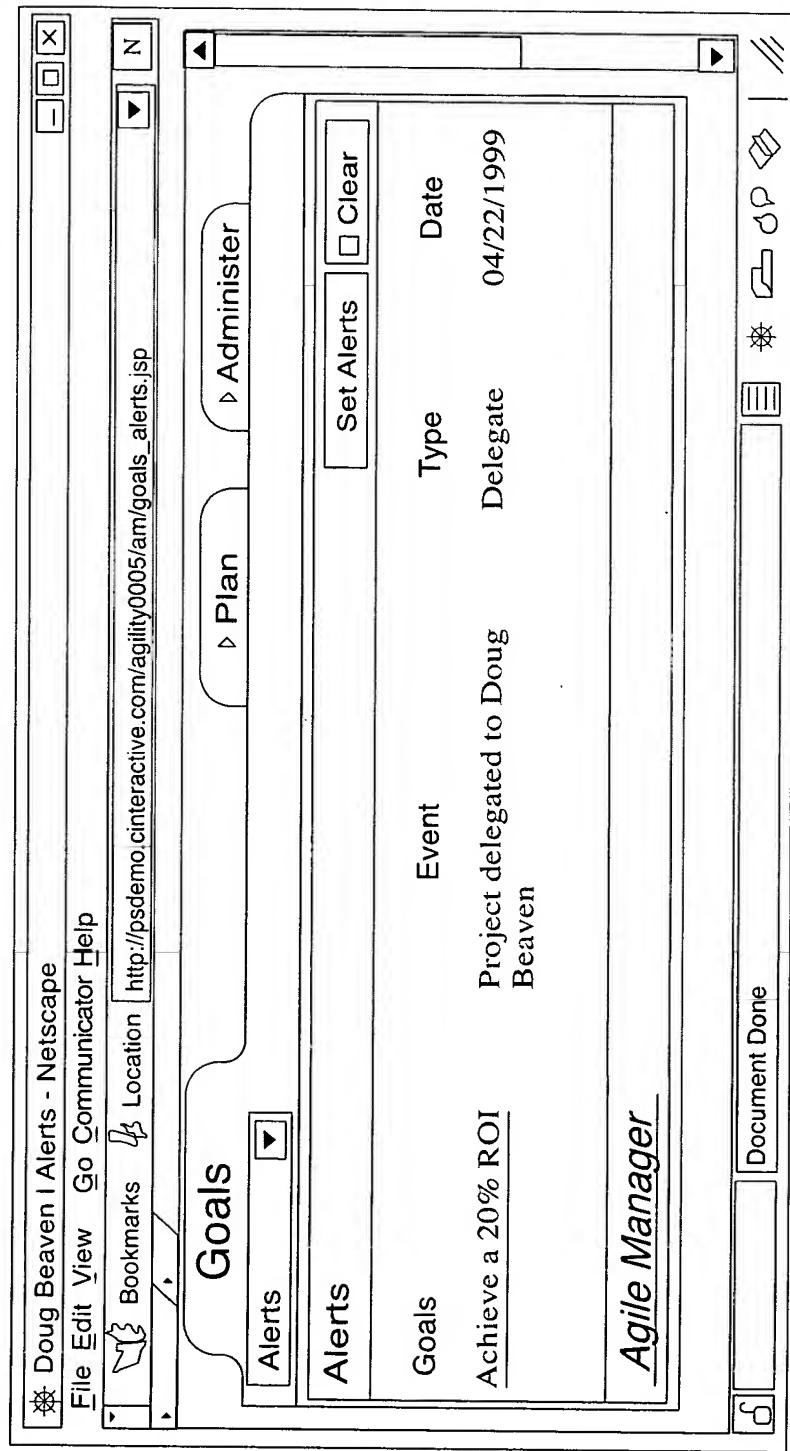


Fig. 26

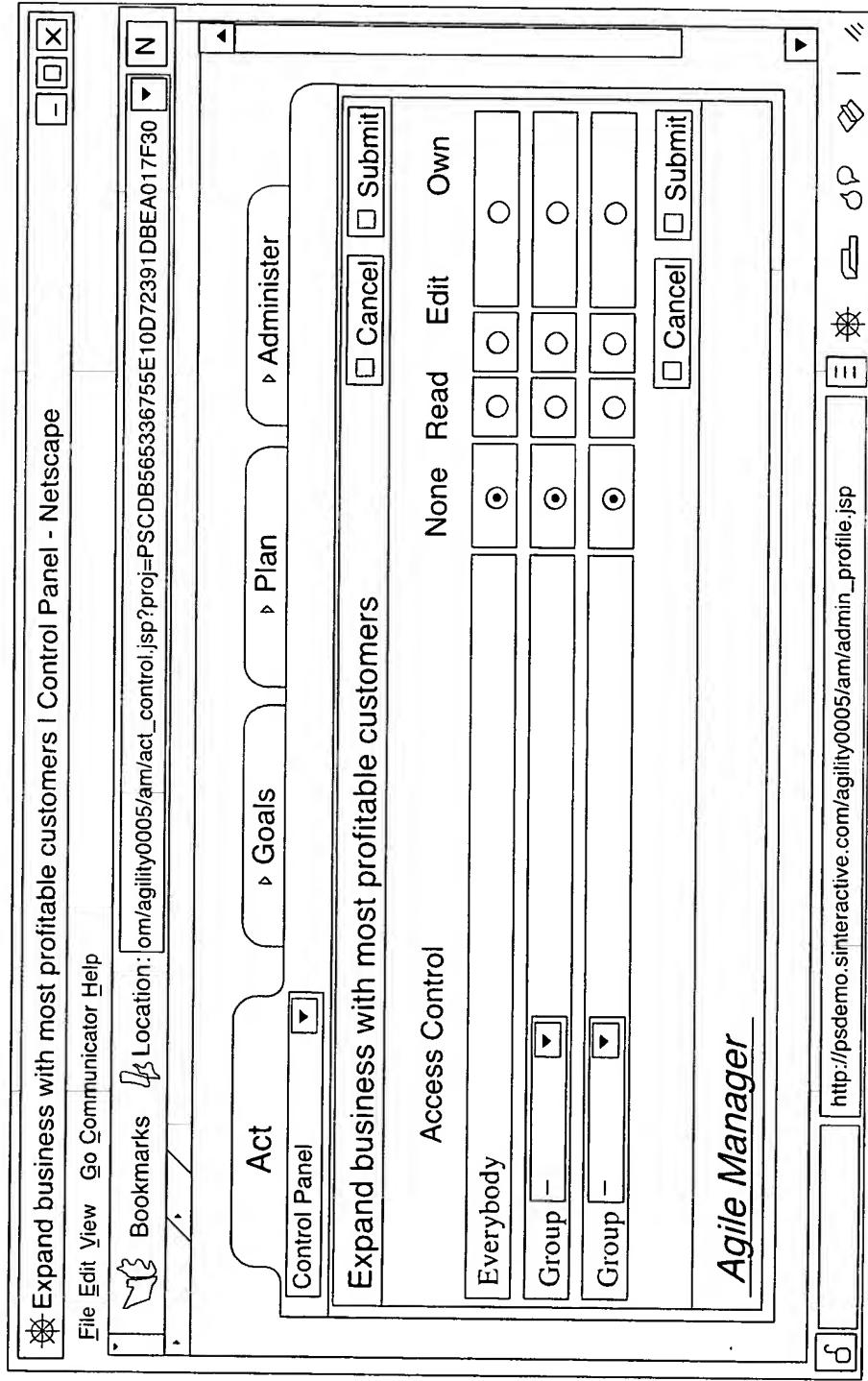


Fig. 27

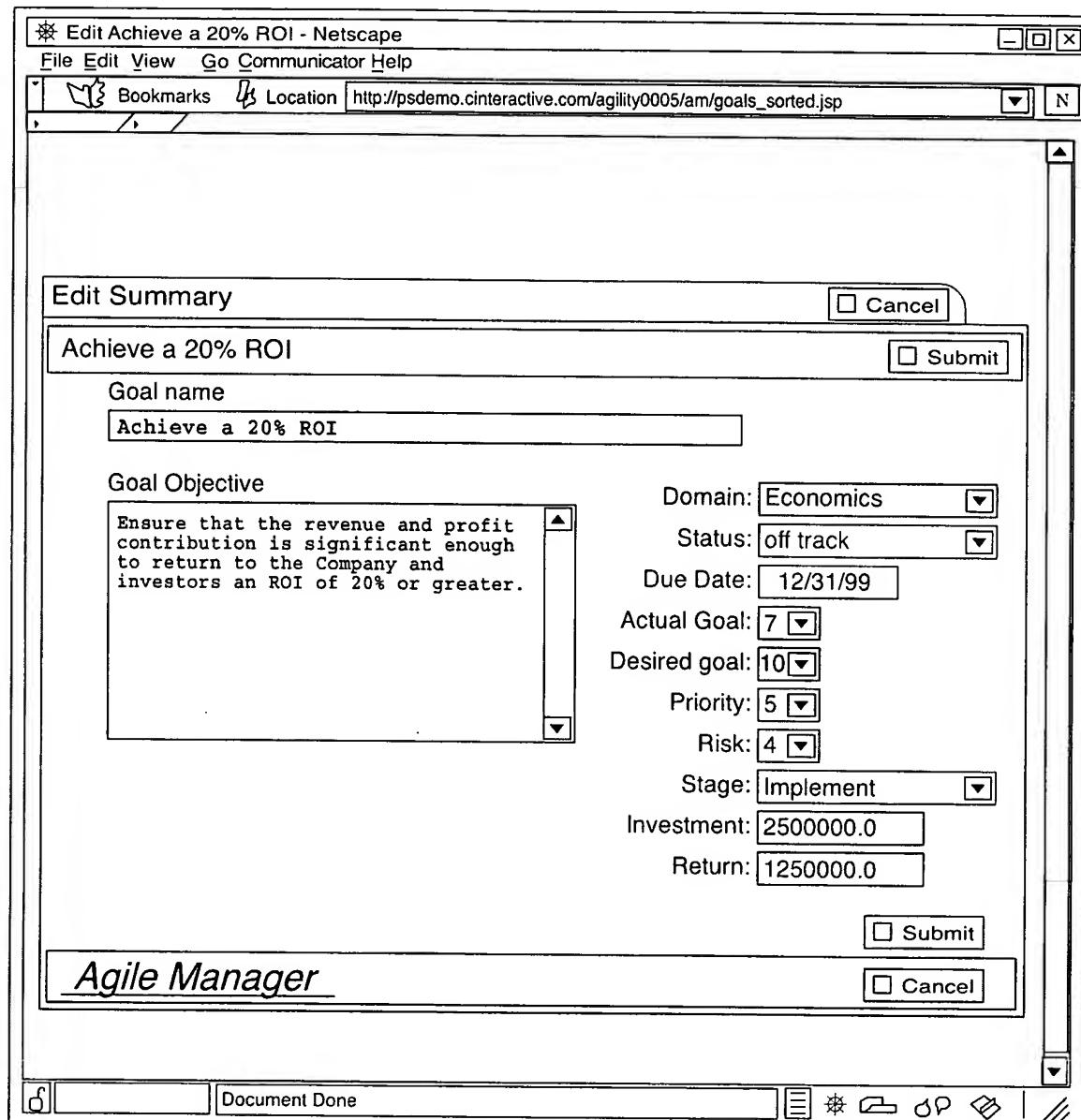


Fig. 28

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Agile Manager | Act | Progress Report - Netscape

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Progress

Act

Goals

Plan

Administrator

Expand business with most profitable customers

Contributing Goals Analysis/Assessment Business Case Development Requirements Gathering Test Prototype Implement Roll-out Retrospective Review

1. Deepen relationships with high net worth clients
2. Have profitable products for every segment

Agile Manager

Document Done

Fig. 29

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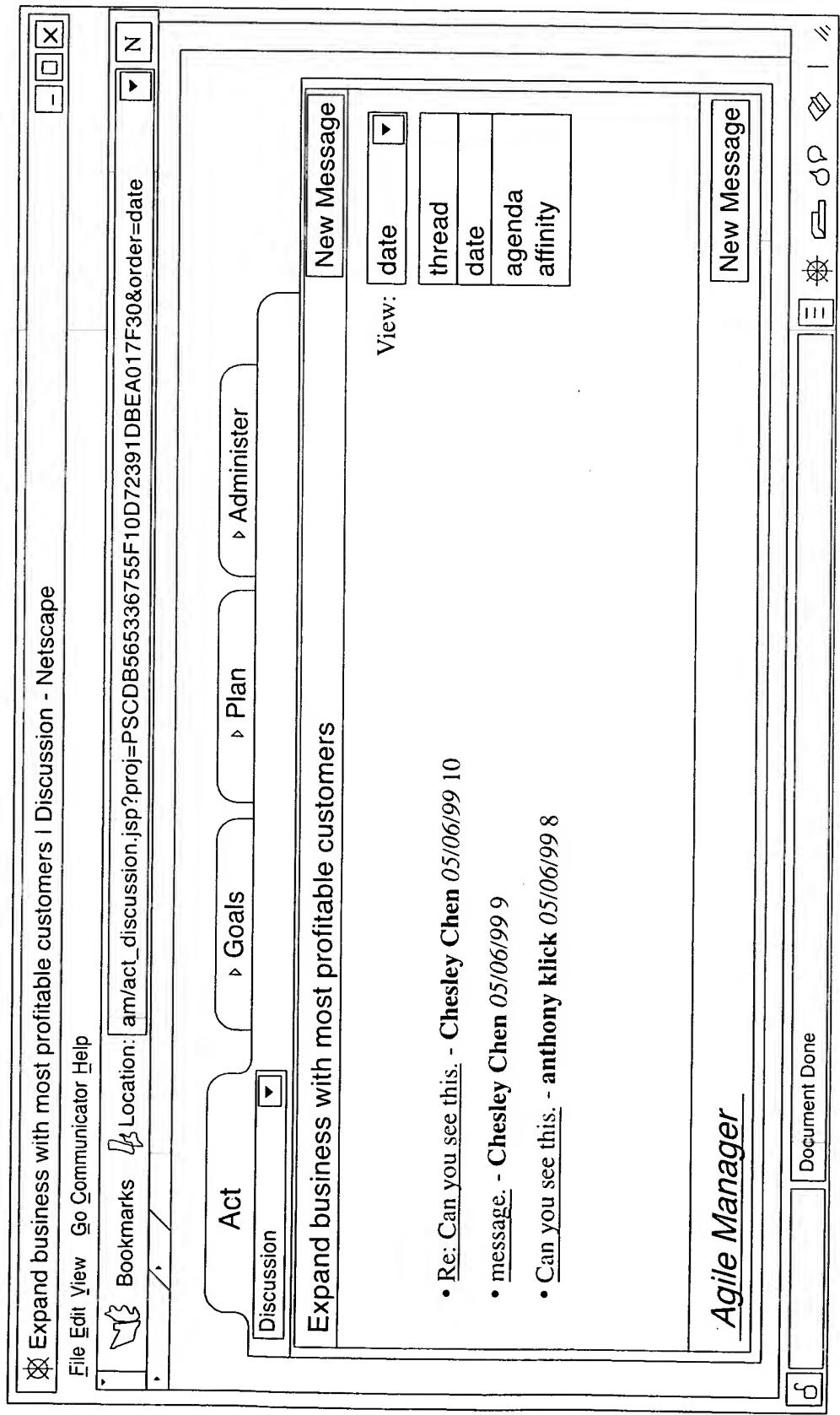


Fig. 30

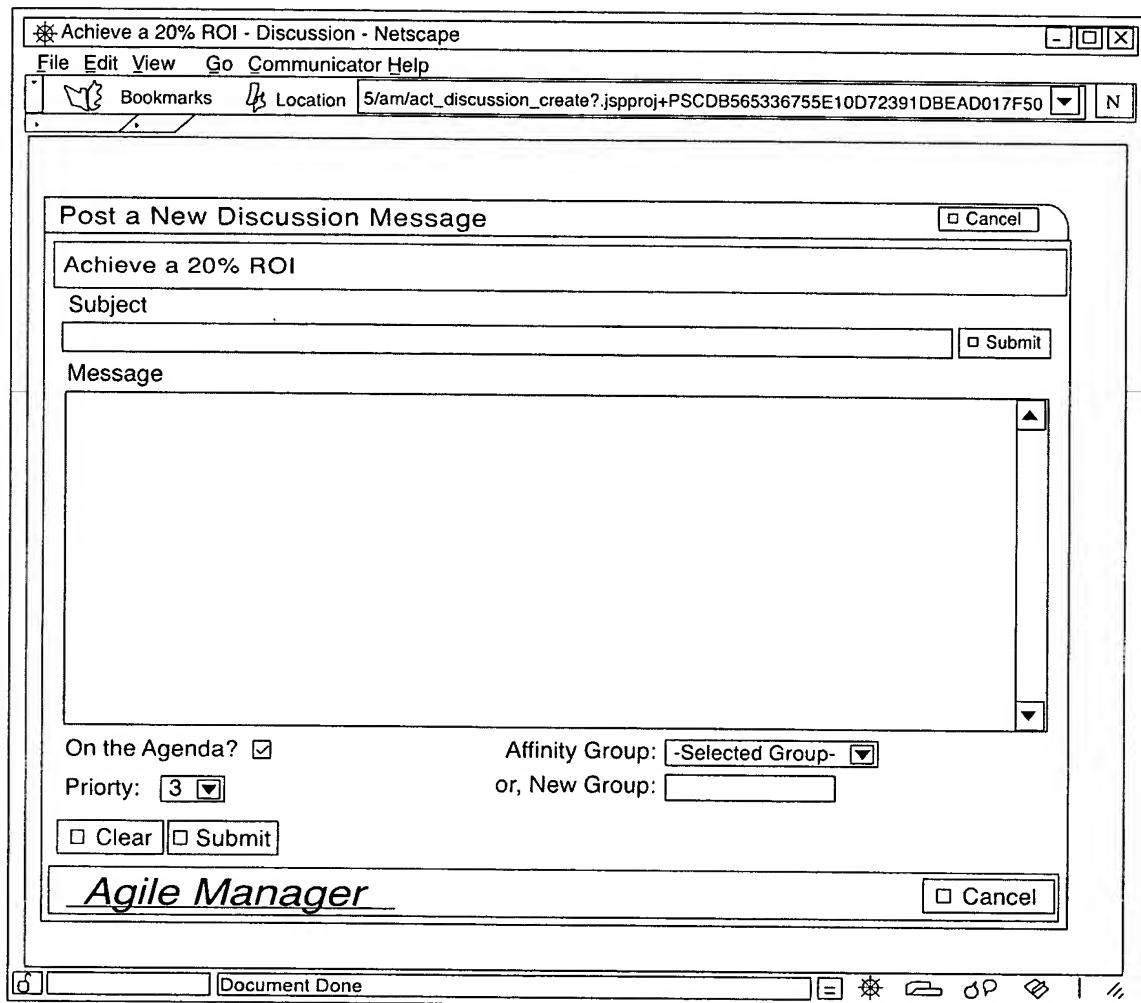


Fig. 31

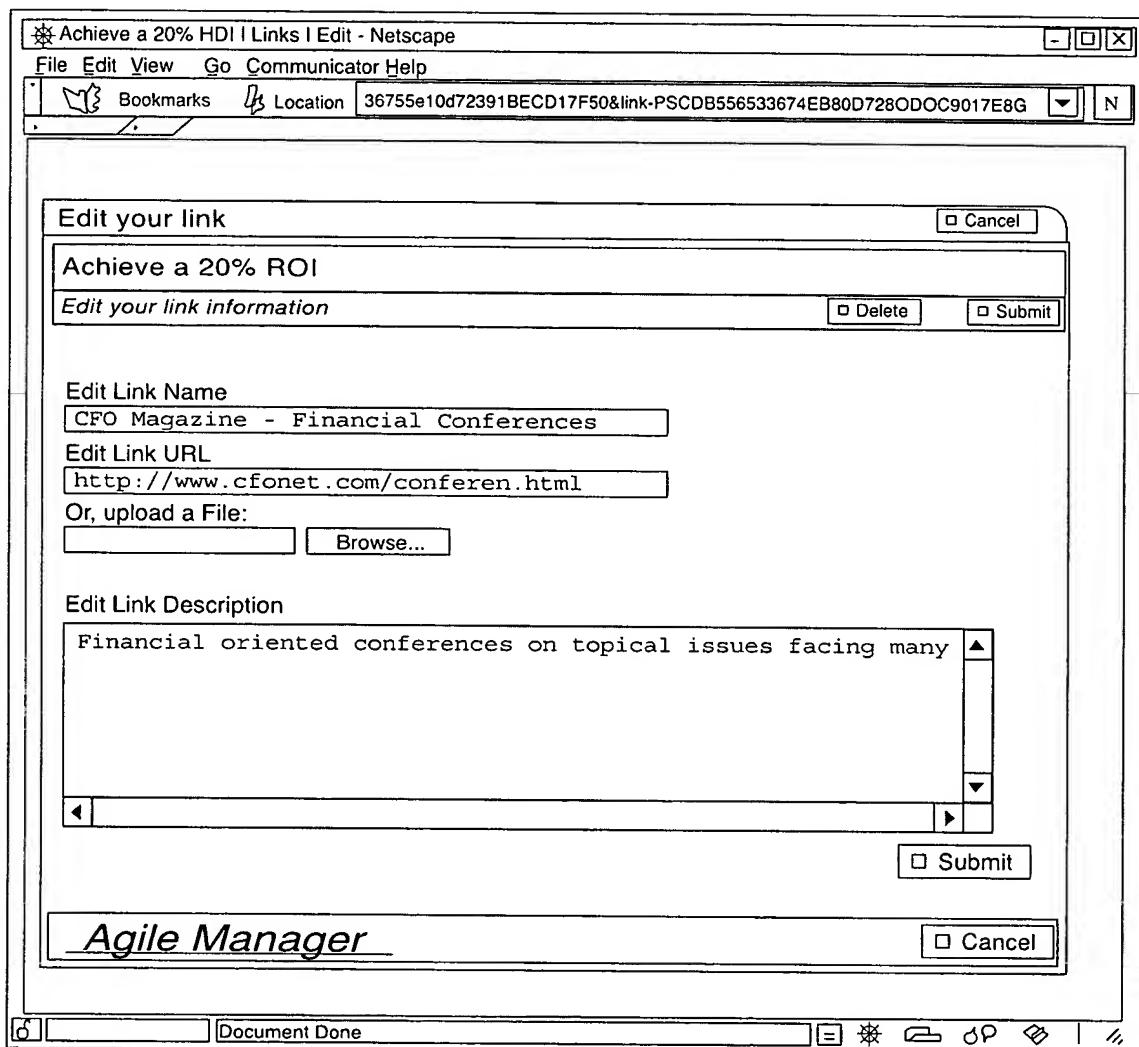


Fig. 32

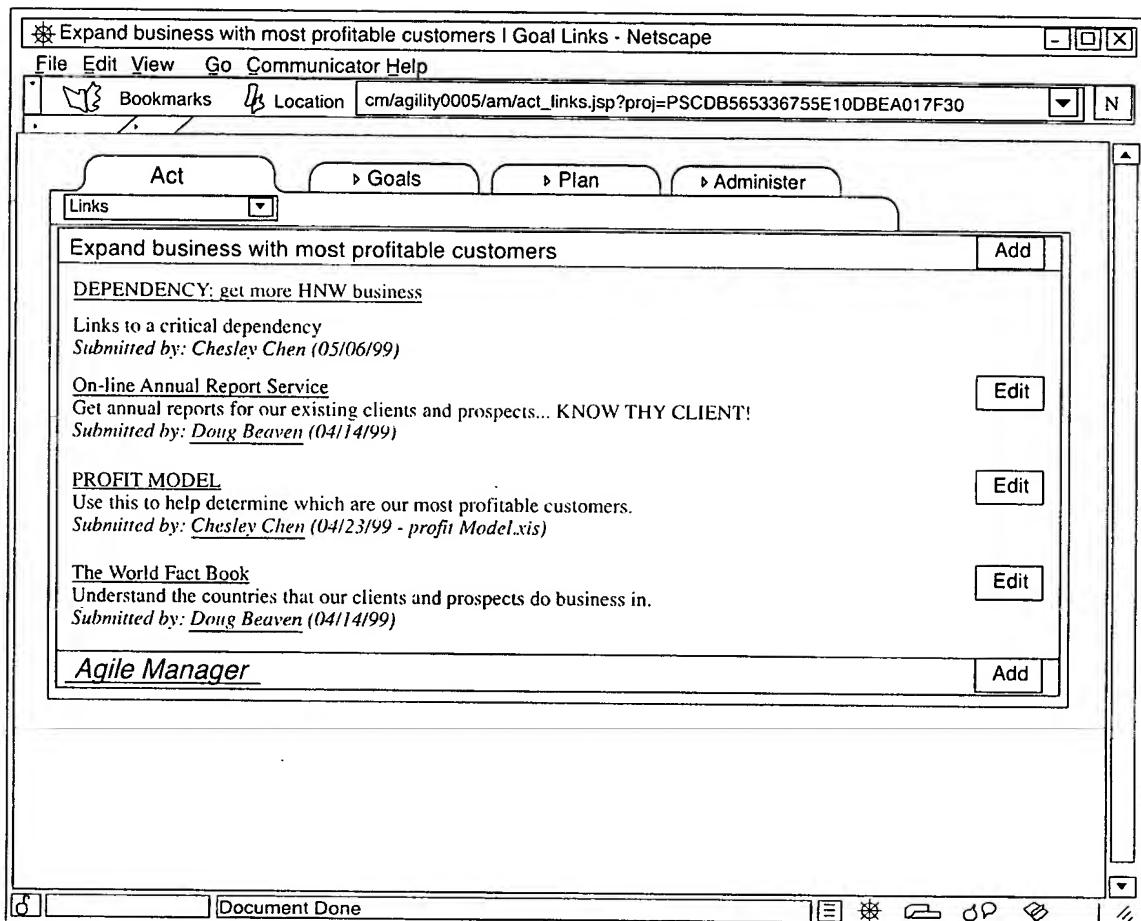


Fig. 33

Agility

MANAGEMENT PARTNERS

EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K. Clifford and Richard E. Cavanagh, *The Winning Performance*

High Performance Traits

Relish change
Fight inertia

Clear strategy
Customer driven

Act like owners
Treated like owners

Reward risk taking
Fact based decisions

Value based decisions
Effective systems

Open to new ideas
Adapt

Process changes
Constant improvement

Fluid boundaries
Teamwork

Anti-bureaucracy
Know business drivers

Make alliances
Focused clearly

Industry trends &
challenges

Basic Information
Feedback

	Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
--	-------------------	----------	-------------------	---------	----------------	-------	----------------	-------------

1. Managers in this company respect the rights of employees and treat them with dignity and respect.
2. Job objectives are aligned with the overall corporate vision.
3. Performance information is shared with employees so they stay focused on results.
4. Compensation and reward structures are aligned with company and/or unit performance.

Fig. 34

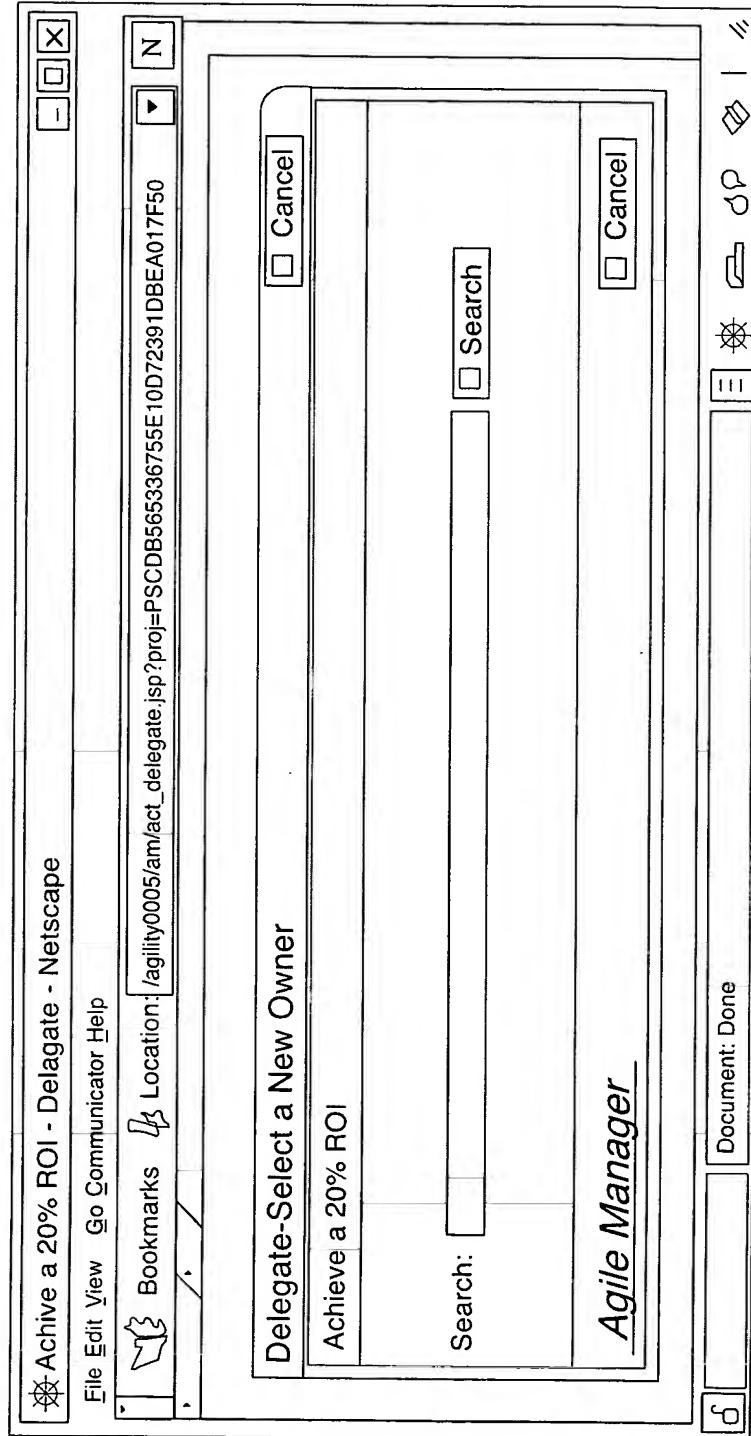


Fig. 34A

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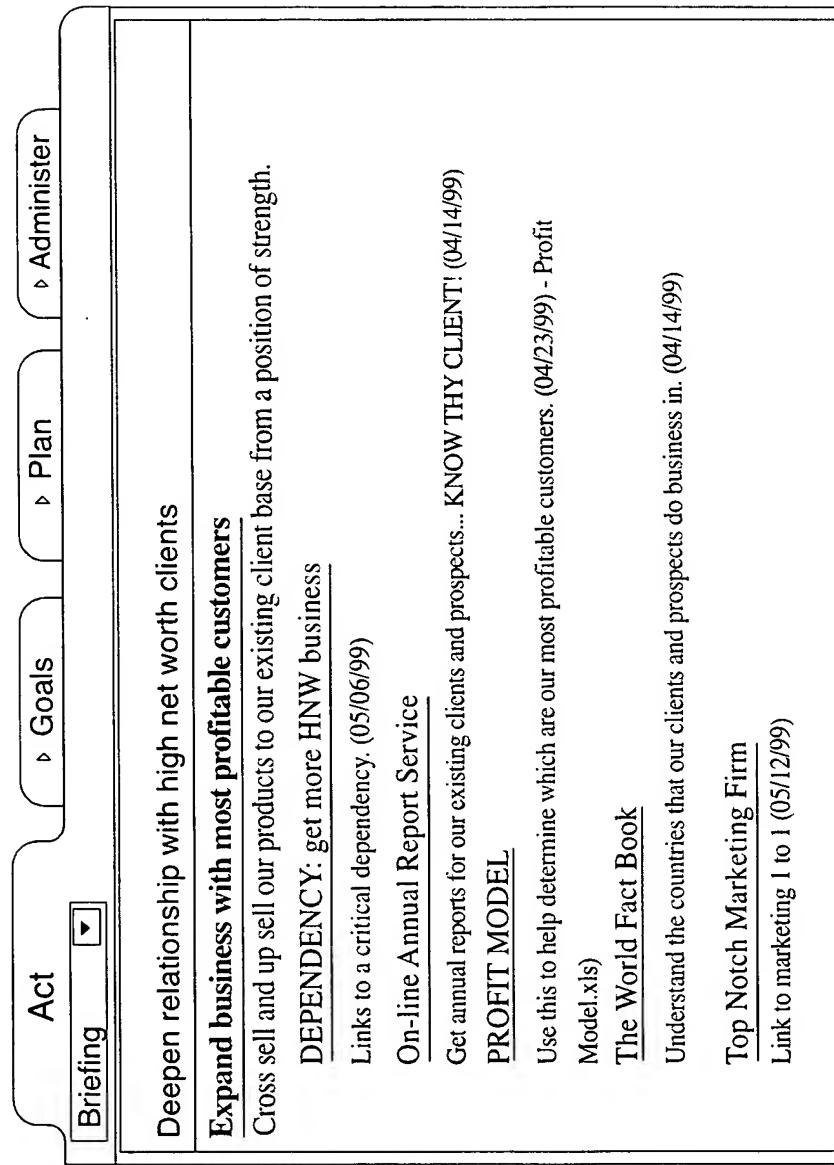


Fig. 35

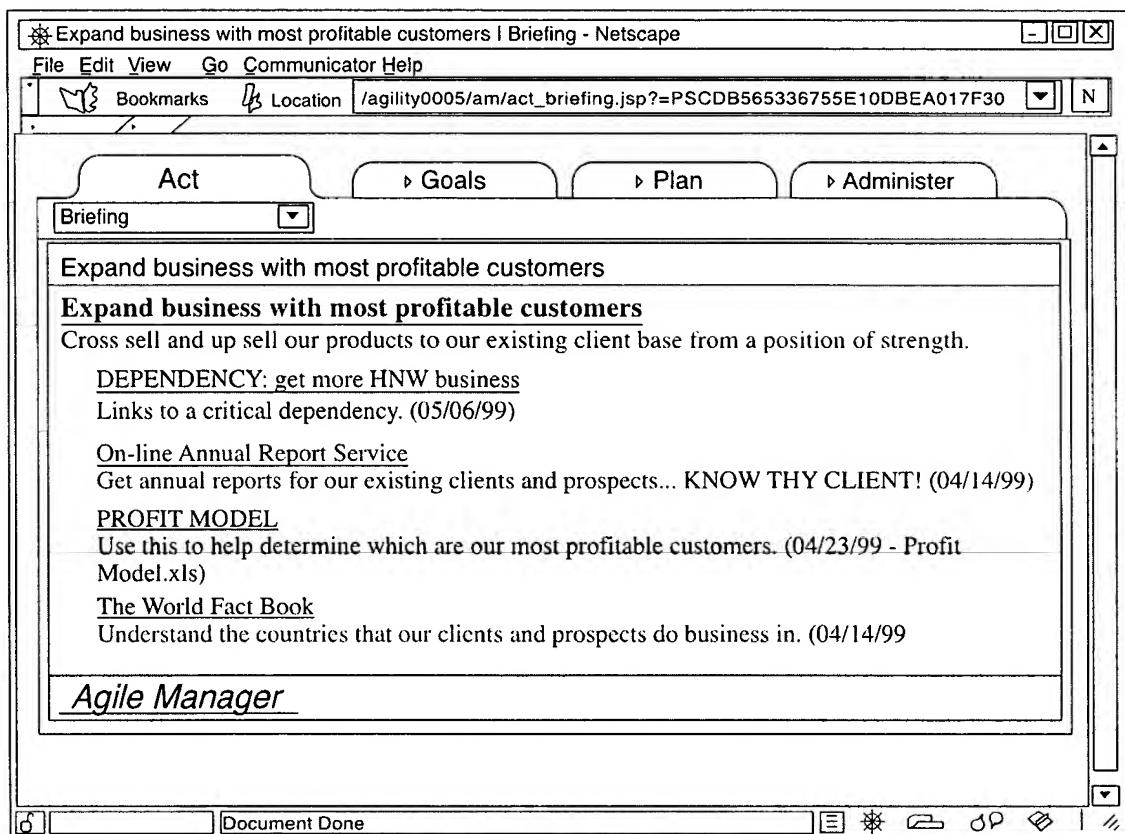


Fig. 36

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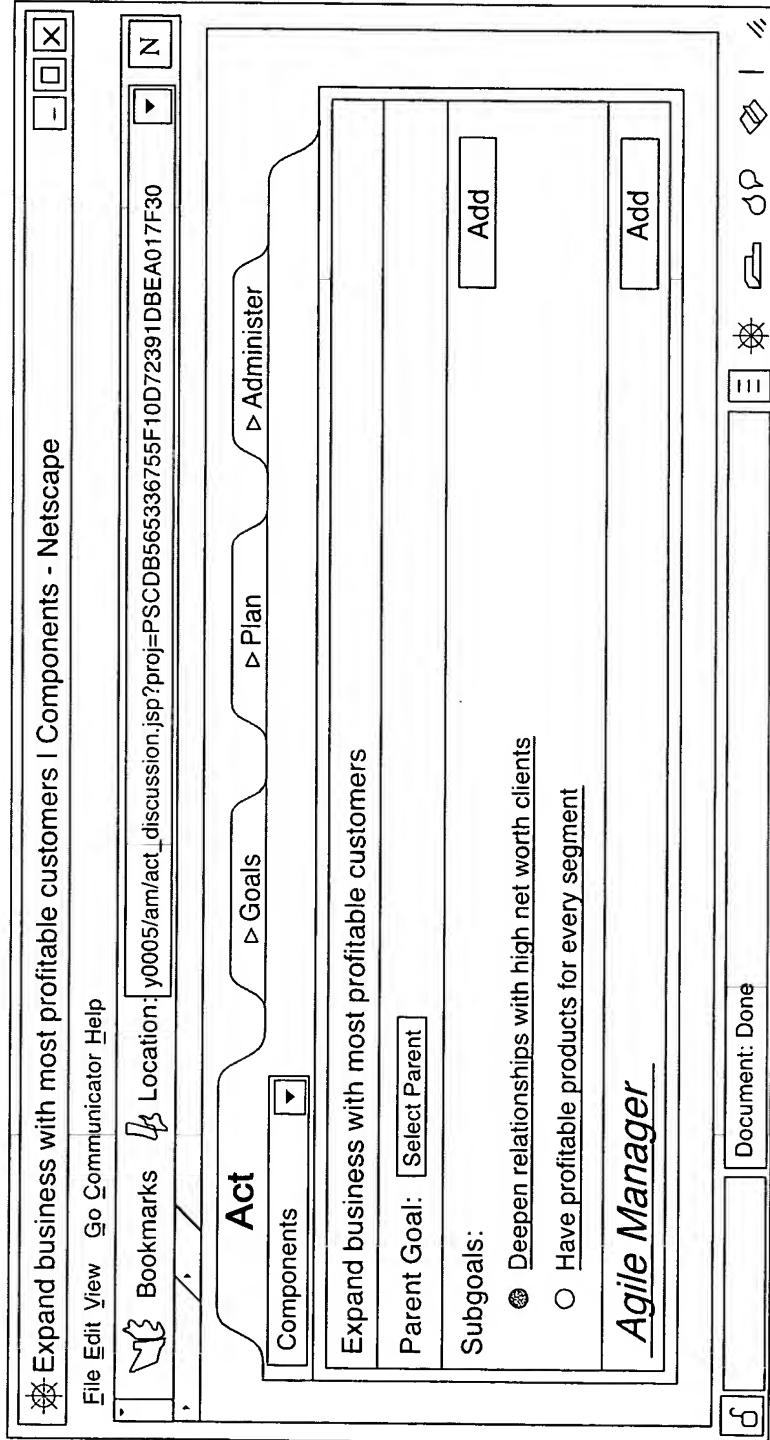


Fig. 37

39/57

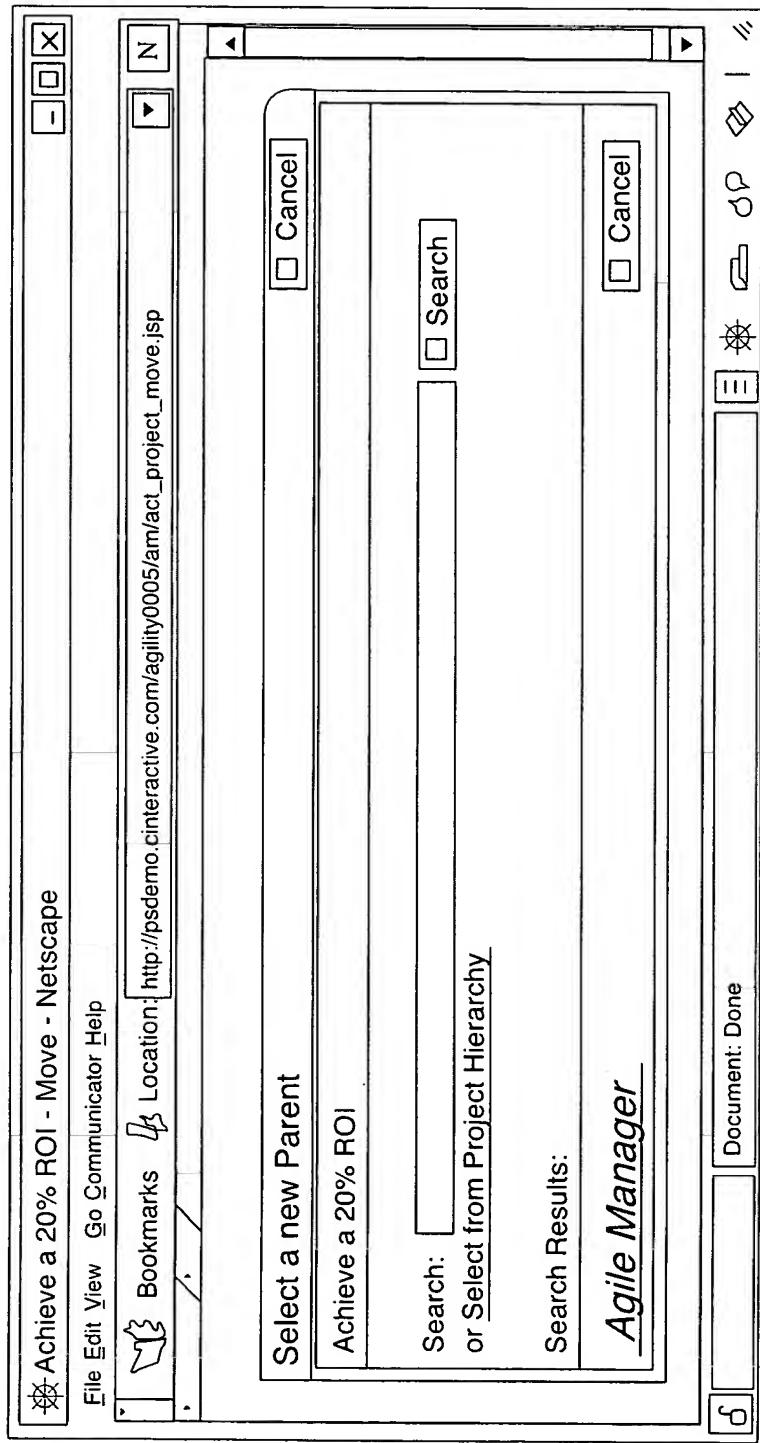


Fig. 38

Expand business with most profitable customers | History - Netscape

File Edit View Go Communicator Help

Bookmarks Location m/agility0005/am/act_briefing.jsp?=PSCDB565336755E10DBEA017F30 N

Act Goals Plan Administer

History ▶

Add Comment

Expand business with most profitable customers

Date	Type	Action
04/14/99	SubProject	Added subproject: Identify clients with the greatest \$ opportunity.
04/14/99	SubProject	Added subproject: Have profitable products for every segment.
04/13/99	Date	Target date changed to 09/01/99
04/13/99	Create	Project created.

Delete Delete Delete

Agile Manager

Document Done

Fig. 39

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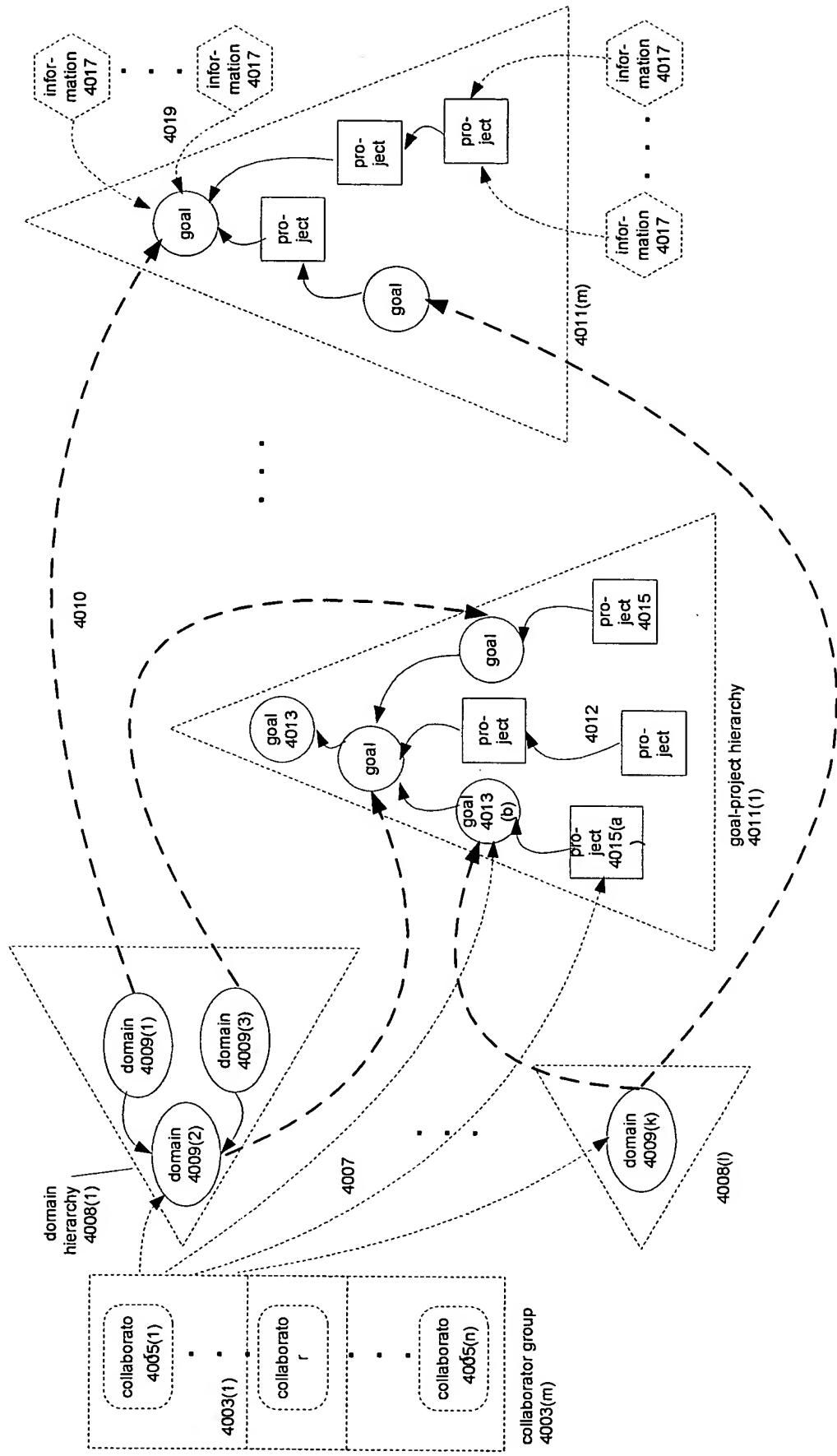


Fig. 40

a model in parent 4001

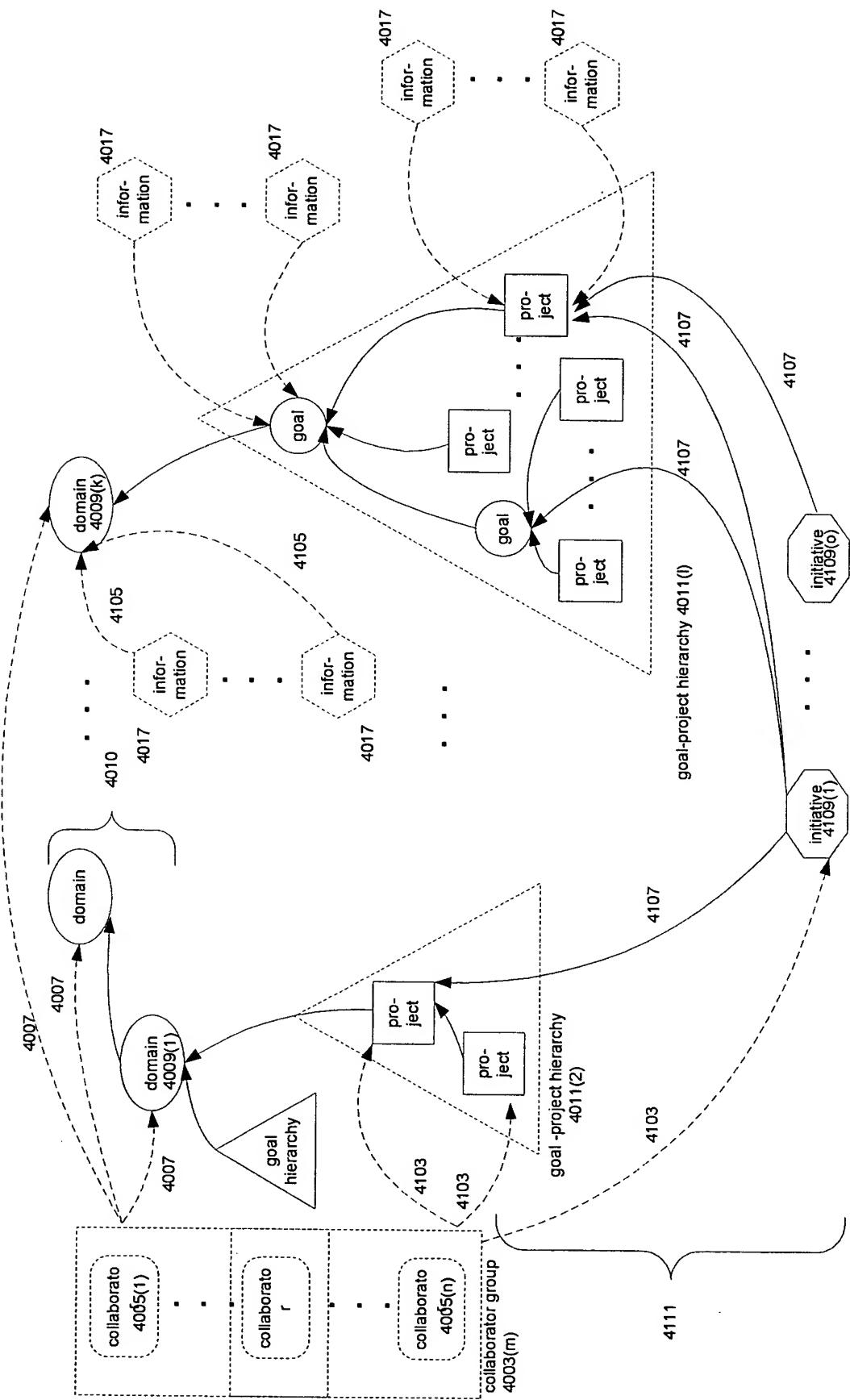
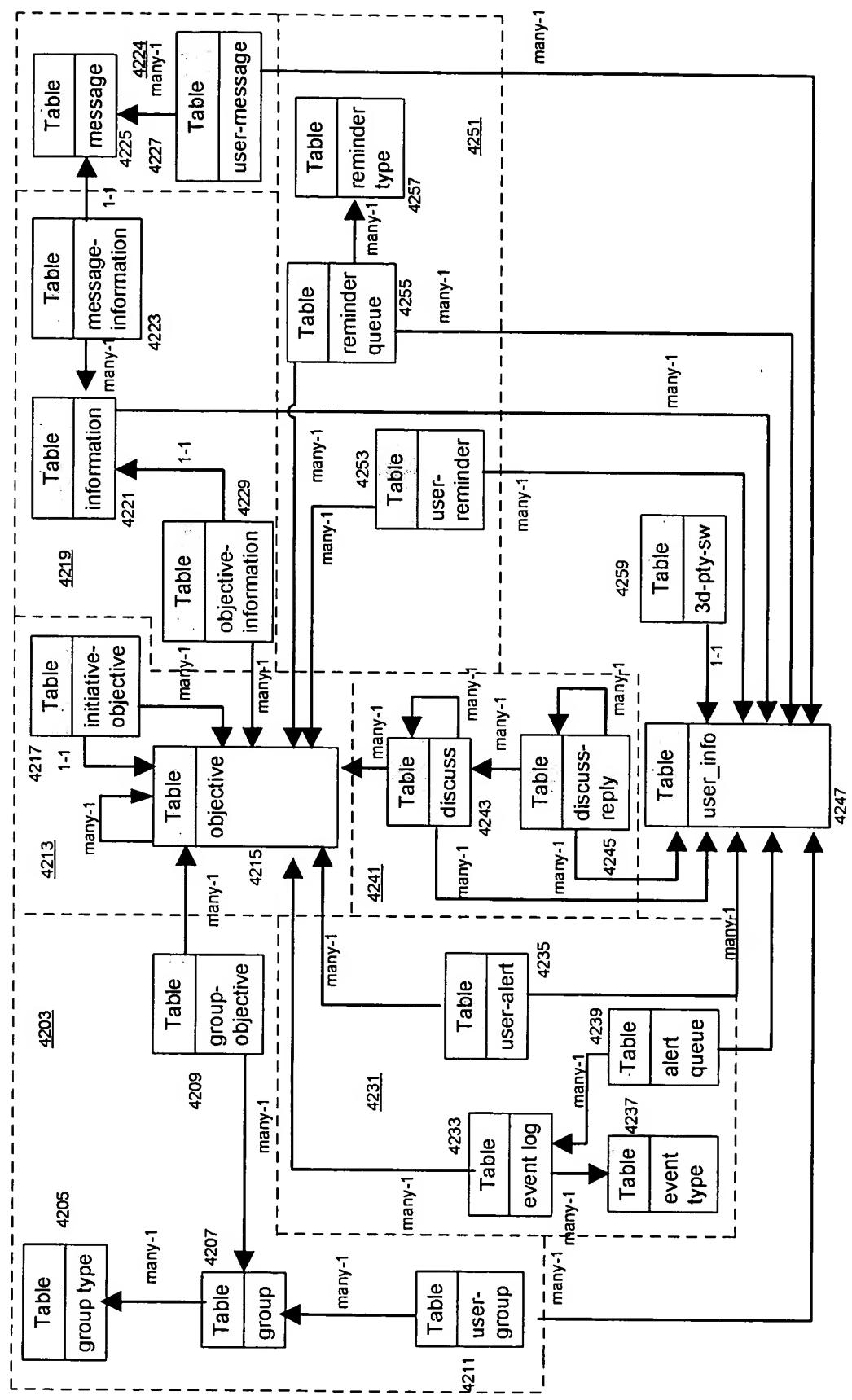


Fig. 41

improved model 4101



```

4303 CREATE TABLE T_GROUP (
4304   GROUP_ID      NUMBER (8)
4305   GROUP_NAME    VARCHAR2 (30),
4307   GROUP_TYPE_KEY NUMBER (8),
4308   CREATED_DATE  DATE
4309   DEFAULT SYSDATE,
4310   UPDATED_DATE  DATE,
4311   DESCRIPTION   VARCHAR2 (255),
4312   GROUP_CATEGORY VARCHAR2 (10),
4313   FILTER_USER   VARCHAR2 (20)
4314   DEFAULT USER NOT NULL,
4315   CONSTRAINT GROUP_UK1
4316     UNIQUE (GROUP_NAME),
4317   CONSTRAINT GROUP_PK
4318     PRIMARY KEY (GROUP_ID));

```

4207

```

CREATE TABLE T_GROUP_TYPE (
4311 GROUP_TYPE_KEY NUMBER (8)      NOT NULL,
4313 GROUP_TYPE      VARCHAR2 (32),
4315 SECURITY_LEVEL NUMBER (2),
4316 CREATED_DATE    DATE          DEFAULT SYSDATE,
4317 UPDATED_DATE    DATE,
4318 CONSTRAINT GROUP_TYPE_PK
4319 PRIMARY KEY (GROUP_TYPE_KEY));

```

4205

```

CREATE TABLE T_GROUP_OBJECTIVE (
4317 GROUP_ID      NUMBER (8)      NOT NULL,
4319 OBJECTIVE_ID  NUMBER (8)      NOT NULL,
4320 CREATED_DATE  DATE          DEFAULT SYSDATE,
4321 UPDATED_DATE  DATE,
4322 PERMISSION    NUMBER (2)      DEFAULT 0,
4323 FILTER_USER   VARCHAR2 (20)    DEFAULT USER NOT NULL,
4324 CONSTRAINT GROUP_OBJECTIVE_PK
4325 PRIMARY KEY (GROUP_ID, OBJECTIVE_ID));

```

4209Fig. 43

```

CREATE TABLE T_OBJECTIVE (
4401 OBJECTIVE_ID          NUMBER (8)      DEFAULT 0 NOT NULL,
4403 OBJECTIVE_NAME        VARCHAR2 (50)   NOT NULL,
4405 OBJECTIVE_TYPE_CODE   CHAR (1)       NOT NULL,
4407 OBJECTIVE_DESC        VARCHAR2 (1000),
4409 { OWNER_USER_ID       NUMBER (8)      NOT NULL,
        DELEGATEE_USER_ID  NUMBER (8),
4411 PARENT_ID             NUMBER (8),
        KEY_BENEFIT        VARCHAR2 (1000),
        RISK_CODE           VARCHAR2 (3),
        PRIORITY_CODE       VARCHAR2 (3),
        PERCENT_COMPLETE    NUMBER (3),
        MAX_DURATION_DAYS   NUMBER (6),
        EST_DURATION_DAYS   NUMBER (6),
        MIN_DURATION_DAYS   NUMBER (6),
        ACT_FINISH_DATE     DATE,
        EST_FINISH_DATE     DATE,
        START_DATE          DATE,
        DUE_DATE             DATE,
        STATUS_SCORE         NUMBER (6,2),
        STATUS_CODE          VARCHAR2 (3),
        LOCKER_USER_ID       NUMBER (8),
        LOCK_FLAG            NUMBER (1),
        DISPLAY_SEQUENCE     NUMBER (4),
        MEASUREMENT          VARCHAR2 (255),
        LEADER_USER_ID        NUMBER (8),
        CHAMPION_USER_ID     NUMBER (8),
        ACT_PAYBACK           NUMBER (12,2),
        EST_PAYBACK           NUMBER (12,2),
        ACT_COST              NUMBER (12,2),
        EST_COST              NUMBER (12,2),
        ARCHIVED_FLAG         NUMBER (1)      DEFAULT 0,
        DESIRED_OBJ_ACHIEVE  NUMBER (3),
        EST_OBJ_ACHIEVE       NUMBER (3),
        CREATED_DATE          DATE          DEFAULT SYSDATE,
        UPDATED_DATE          DATE,
        STAGE_CODE             CHAR (3),
        FILTER_USER            VARCHAR2 (20)  DEFAULT USER NOT NULL,
        DELETED_FLAG           NUMBER (1)      DEFAULT 0,
        CONSTRAINT OBJECTIVE_CK1
          CHECK (OBJECTIVE_TYPE_CODE IN ('D','I','A','R')) ,
        CONSTRAINT OBJECTIVE_UK1
          UNIQUE (OBJECTIVE_NAME, OBJECTIVE_TYPE_CODE),
        CONSTRAINT OBJECTIVE_PK
          PRIMARY KEY ( OBJECTIVE_ID ) ) ;
4413 }

4415 { CREATE UNIQUE INDEX OBJECTIVE_IDX1 ON
        T_OBJECTIVE(OBJECTIVE_ID, PARENT_ID)
    }

```

```

CREATE TABLE T_INFORMATION (
4501 ID          NUMBER (12)  NOT NULL,
4503 NAME        VARCHAR2 (255) NOT NULL,
4505 DESCRIPTION VARCHAR2 (4000),
4507 OWNER_ID    NUMBER (8)   NOT NULL,
4509 TYPE        VARCHAR2 (12) NOT NULL,
4511 MIMETYPE    VARCHAR2 (32) NOT NULL,
        FILESIZE    NUMBER (12)  DEFAULT 0,
        VERSION     NUMBER (3,1) DEFAULT 1 NOT NULL,
        URL         VARCHAR2 (4000) NOT NULL,
        CREATED_DATE DATE        DEFAULT SYSDATE,
        UPDATED_DATE DATE        DEFAULT NULL,
        DELETED     NUMBER (1)   DEFAULT 0 NOT NULL,
4513 OBJECTIVE_ID NUMBER (12),
        FILTER_USER  VARCHAR2 (20) DEFAULT USER NOT NULL,
        UNIQUE_(ID)  );

```

4221

```

CREATE TABLE T_MESSAGE (
4515 MESSAGE_ID    NUMBER (8)  NOT NULL,
4517 MESSAGE SUBJECT VARCHAR2 (255),
        MESSAGE_BODY  VARCHAR2 (1000),
        MESSAGE_SIZE  NUMBER (12),
        OWNER_USER_ID NUMBER (8),
        CREATED_DATE  DATE        DEFAULT SYSDATE,
        UPDATED_DATE  DATE,
        FILTER_USER   VARCHAR2 (20) DEFAULT USER NOT NULL,
        CONSTRAINT MESSAGE_PK
        PRIMARY KEY ( MESSAGE_ID ) );

```

4225

Fig. 45

47/57

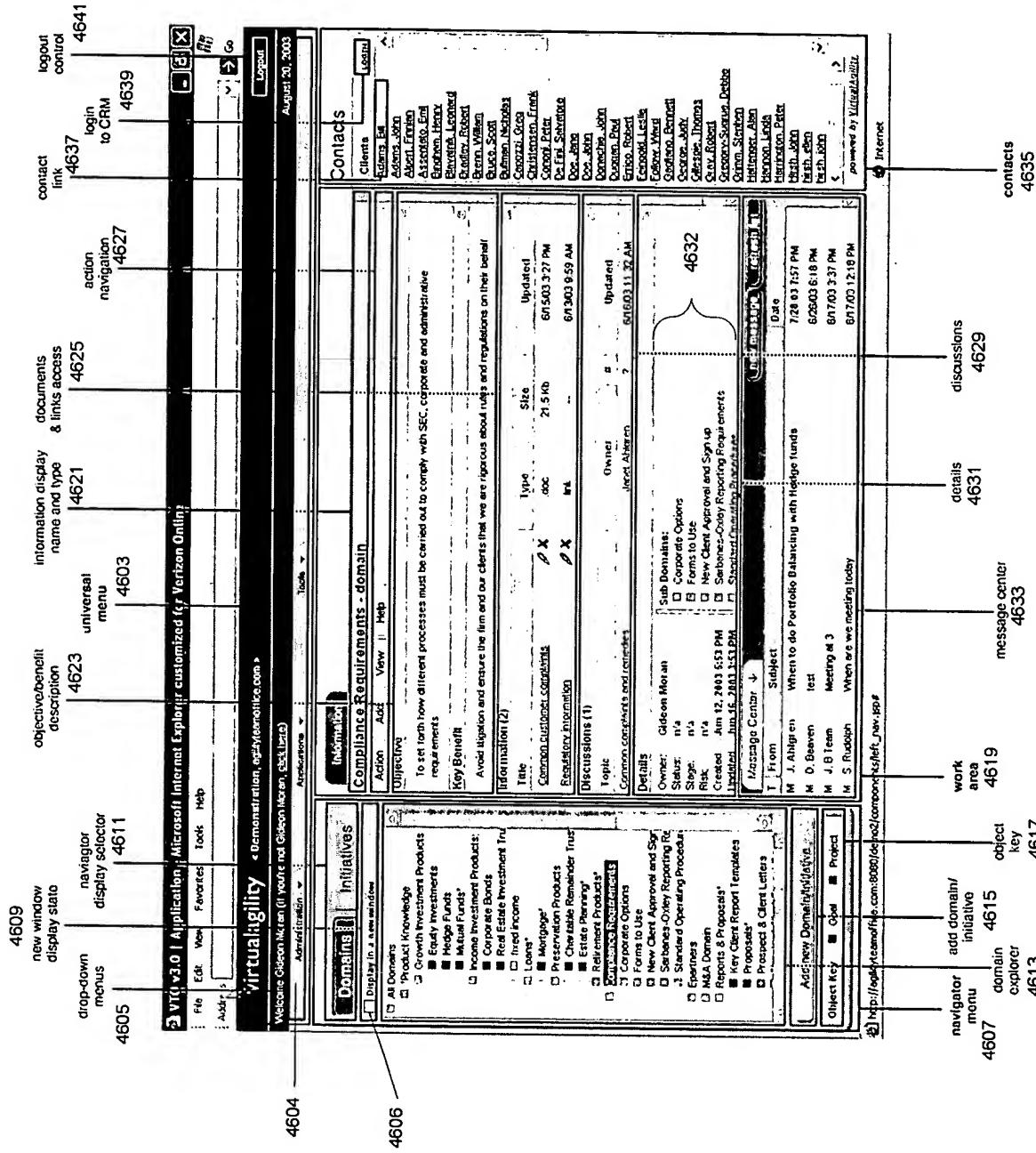


Fig. 46

4601

48/57

4705

4707

4703

4701

Virtualagility <virtualAgility Demo, agileworktop.com >

Welcome Jane Doe (If You're not Jane Doe, click here)

Administration Applications Tools

Information

Initiatives

Display in a new window.

All Initiatives

GenAM

- Term - Marketing Material - general
- Term - Rates, Approved States
- Term (GenAM) Marketing Material
- Term Proposals, GenAM in Progress
- Whole Proposals, GenAM Approved
- MLI Products
- MLI Term Life Products
- NEF Products
- NEF Term Life Products
- NEF Whole Life

Domains

Objectives

Sub Initiative

Sub Activity

Sub Resource

Information

Key Benefit

Discussion Topic

GenAM - Initiative

Action Add View Help

Objectives

Sub Initiative

Sub Activity

Sub Resource

Information

Key Benefit

Discussion Topic

Information (1)

Title / NEF

Type / Link

Size /

Updated / 12/10/03 10:27 AM

Discussions (0)

There are no open discussions

Details

Owner: Jane Doe
Status: n/a
Stage: n/a
Risk: n/a
Created: Dec 1, 2003 10:10 AM
Updated: --
Due: --

Resources:

- Term - Marketing Material - general
- Term - Rates, Approved States
- Term (GenAM) Marketing Material

Activities:

- Term Proposals, GenAM in Progress
- Whole Proposals, GenAM Approved

Contacts

Logout

December 1, 2003

clients

Logon

Please click login above to login to SalesLogix.

New Message 10/17/2003

Message Center ↑ New Message: 27

Object Key Activity Resource

Done

Internet

powered by VirtualAgility

Fig. 47

49/57

4803 4627

Information

Project Office* - domain

Action Add View Help

Objective Sub Domain

Sub Goal Sub Project

Oversee Information

Key Benefit Discussion Topic

Focus, 4805

Information (6)

Title	Type	Size	Updated
Comparative merger information	link	--	8/9/03 11:14 PM
Correspondence file for Offices	.doc	92.5 KB	8/9/03 11:20 PM
Discussions with other mergers	link	--	8/9/03 11:22 PM
Post Merger Plans	.ppt	85.0 KB	8/9/03 11:23 PM
Statistics on Mergers	link	--	8/9/03 11:15 PM
Status of Merger	.doc	92.5 KB	8/9/03 11:18 PM

Discussions (1)

Topic	Owner	Updated
Agreement on Merger Commencement	Robert Gould	8/11/03 2:44 PM

Details

Owner: Robert Gould Sub Domains:

Status: n/a Budget

Stage: n/a Project Office Data Files

Risk: n/a Project Plan

Created: Jul 31, 2003 8:33 AM Team* Contact List

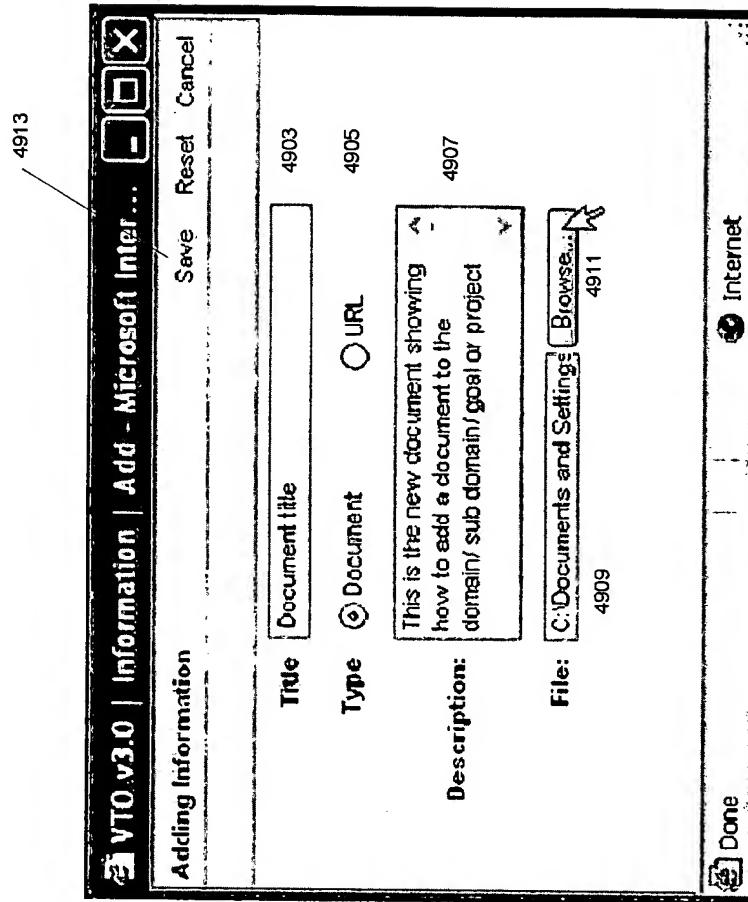
Updated: Aug 9, 2003 1:26 PM Due:

New Message Refresh

Message Center ↑

4801

Fig. 48



4901

Fig. 49

51/57

Information

New Initiative

Name	5002												
Parent	Genam												
Select Parent Object													
No Parent	5003												
Genam	5005												
Objective	<ul style="list-style-type: none"> ... mli products ... mli term life products ... mli whole life ... nef products ... nef term life products ... nef whole life 												
Key Benefit													
Activity	<input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="select stage"/> <input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="select status"/> <input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="select risk"/> <input style="border: none; border-bottom: 1px solid black; padding: 0 5px;" type="button" value="5004"/>												
Due Date	<input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="Month"/> <input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="Day"/> <input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="Year"/> <input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="5006"/>												
Permissions	<table border="1" style="margin-left: 20px;"> <tr> <td>Group</td> <td>Read</td> <td>Write</td> <td>Delete</td> </tr> <tr> <td>MLI</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>NEF</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	Group	Read	Write	Delete	MLI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	NEF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group	Read	Write	Delete										
MLI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>										
NEF	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>										
<input style="border: none; border-bottom: 1px solid black; padding: 0 5px; margin-right: 5px;" type="button" value="5007"/>													

Available Activities

Term Proposals, [MLI] Approv

Term Proposals, GenAM - Apv

Term Proposals- NEF , Approv

Term Proposals, GenAM in Prog

Term Proposals, MLi in Prog

Term Proposals, NEF in Prog

Whole Proposals, GenAM Apv

Whole Proposals, MLi, Approv

Activities

Current Activities

Message Center ↑

5001

Fig. 50

52/57

Information

New Initiative

Name:

Parent: genam

Objective: 5107

Key Benefit: 5109

Activity: select stage select status select risk 5004

Due Date: Month Day Year 5006

Permissions

Group	Read	Write	Delete
MLI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Available Activities

Term Proposals, [MLI] Approv

Term Proposals, GenAM - Apv

Term Proposals- NEF , Approv

Term Proposals, GenAM in Pr

Term Proposals, MLi in Progre

Term Proposals, NEF in Progr

Whole Proposals, GenAM Apv

Whole Proposals, MLi, Approv

Activities

Current Activities

Message Center ↑

Fig. 51

53/57

Information

Activity

Due Date

Permissions

Group	Read	Write	Delete
MLI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Activities

Available Activities

- Term Proposals, [MLI] Approve
- Term Proposals- NEF, Approve
- Term Proposals, GenAM in Prog
- Term Proposals, NEF in Prog
- Whole Proposals, GenAM in Prog
- Whole Proposals, NEF
- Whole Proposals, MLI, Approve
- Whole Proposals-NEF, Approve

5205

Current Activities

- Term Proposals, GenAM - API
- Term Proposals, MLI in Prog

5203

Resources

Available Resources

- Life - Case Design
- Term - Marketing Material
- Term - Rates, Approved
- Term [MLI] Marketing Mater
- Term Seminars, Presenter
- Term - Case Design, Illustr
- Term - Competition
- Term [GenAM] Marketing Mater
- Term [NEF] Marketing Mater
- Universal - marketing mater

5213

Current Resources

- Marketing Mater
- Universal - marketing mater

5209

Message Center

Save

5201

Fig. 52

VirtualAbility < VirtualAbility Demo, sageworkshop.com >

Welcome Jane Doe (If you're not Jane Doe, [Click here](#))

File Edit View Favorites Tools Help

Logout December 1, 2003

Administration Applications Tools Contacts

Domains Initiatives

Display in a new window

All Initiatives 5302

GenAM

- Term - Marketing Material - general
- Term - Rates, Approved States
- Term [GenAM] Marketing Material
- Term Proposals, GenAM in Progress
- Whole Proposals, GenAM Approved

MLI Products

MLI Term Life Products

MLI Whole Life

NEF Products

NEF Term Life Products

NEF Whole Life

Information

GenAM - Initiative

Action:

Objective: Sub Initiative Sub Activity Sub Resource Information Discussion Topic

Key Bene: dg disc

Information (1)

Type	Size	Updated
X	10K	12/1/03 10:27 AM

Discussions (0)

There are no open discussions

Details

Owner: Jane Doe

Resources:

Status: na	Term - Marketing Material - general
Site: na	Term - Rates, Approved States
Risk: na	Term [GenAM] Marketing Material
Created: Dec 1, 2003 10:10 AM	Activities:
Updated: --	Term Proposals, GenAM In Progress
Due: --	Whole Proposals, GenAM Approved

Contacts

Client Login

5303

Please click login above to login to SalesLogic.

[Logout](#) [Refresh List](#) [New/Print](#) [Done](#)

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Internet

Fig. 53

New activity

Information

New activity	
Name	5403
Parent	Select Parent Object Select Parent Object
Objective	life insurance ... "life - case design ... "Term life ... "Term - marketing material - general ... "Term - rates, approved states ... "Term [mif] marketing material ... "Term seminars, presentations ... "Term - case design, illustrations, b ... "Term - competition ... "Term [general] marketing material ... "Term [net] marketing material ... term approved proposals
Key Benefit	term proposals, [mif] approved ... term proposals, general - approved ... term proposals- net, approved ... term proposals- in progress ... term proposals, general in progress ... term proposals, mif in progress ... term proposals, net in progress
Activity	universal life variable life
Due Date	Year <input type="button" value=">"/>
Permissions	Write <input type="checkbox"/> Delete <input type="checkbox"/>
	Save <input type="button" value="Save"/> Reset <input type="button" value="Reset"/> Cancel <input type="button" value="Cancel"/>
Message Center ↑ New Message: 2 <input type="button" value="New message"/> Refresh <input type="button" value="Refresh"/>	

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Welcome Gideon Moren (if you're not Gideon Moren, click here)

Administration ▾

Domains

Initiatives

Display in a new window

All Domains

4606

Virtual Web servers, summer 2003

What is a Domain

Advanced Markets Group® products

BTS, Bruce Strong

BP Domain

Business Partner

Financial Services Operation

Fourth Utility

FS, Products and Services

Input Products

KE-Biography Projects

Life Insurance

NEF Site

New Client Approval and Sign up

Product Management

Sales Process*

SalesLogic

Sales

SLX Test

Add new DomainInitiative

Object Key ■ Activity ■ Resource

Information

All Domains - domain

Action

Objective

This is the ps

Key Benefit

[None]

Information

Title /

Presentation

Discussions

Title /

VTO 3.0 User Guide

Details

Owner: Tlk

Status: Open

Stage: Init

Risk: Det

Created: Det

Updated: Ap

Due: -

Owner: Janet A

Status: n/a

Stage: n/a

Risk: n/a

Created: Sep 26,

Updated: Nov 6, 2003

Due: -

Contact Info:

569 First NH Turnpike #3

Northwood, NH 03261

Info@abcoquits.org

Phone: 603 942-9211

Toll free: 800-536-5694

Fax: 603 942-9210

URL for this VirtualAgility worktop site

<https://vcs-dev1.virtualagility.com/demos/account/login.jsp>

Information (4)

Title

ABCQ Navigation Statement

ABCQ website link

Type

✓ X

✓ X

Link

Size

19.0 Kb

19.0 Kb

Updated

6/29/03 5:31 PM

1/29/03 2:40 PM

Logout

January 16, 2004

Tools ▾

Applications

Contacts

Clients

Logout

User Guide

VTO v3.03 | Objective | View - Microsoft Internet Explorer

Action

Add

Objective

Consult this user

Key Benefit

Easy access to di

Information (1)

Title /

VTO 3.0 User Guide

Discussions (0)

Owner: Tlk

Status: Open

Stage: Init

Risk: Det

Created: Det

Updated: Ap

Due: -

Owner: Janet A

Status: n/a

Stage: n/a

Risk: n/a

Created: Sep 26,

Updated: Nov 6, 2003

Due: -

Contact Info:

569 First NH Turnpike #3

Northwood, NH 03261

Info@abcoquits.org

Phone: 603 942-9211

Toll free: 800-536-5694

Fax: 603 942-9210

URL for this VirtualAgility worktop site

<https://vcs-dev1.virtualagility.com/demos/account/login.jsp>

Information (4)

Title

ABCQ Navigation Statement

ABCQ website link

Type

✓ X

✓ X

Link

Size

19.0 Kb

19.0 Kb

Updated

6/29/03 5:31 PM

1/29/03 2:40 PM

5501

5503

Fig. 55

57/57

VTO v3.03 | Management | Users/Groups - Microsoft Internet Explorer

Action View Help

Local Users and Groups

Users

- Abbas, Aboo
- Abba, Aboo
- Abbes, Abbo 5603
- Admin, The
- Ager, Paul
- Ahlgren, Dave
- Ahlgren, Ellen
- Ahlgren, Janet
- Ahlgren, Stuart
- Allen, Amy
- Ames, Jason
- Anderson, Heidi
- Angelis, Cathy
- Bachman, Margie
- Bailey, Carolyn
- Bar, Barry
- Bartok, Bella
- Bartomell, Steve
- Beaven, Doug
- Berlin, Rob
- Blaum, Dave
- Boleti, Yannick
- Bond, James
- Bouchard, Michael
- Cahaly, John
- Camosci, Catalina
- Campenells, Maureen

Profile ~ Bella Bartok

First Name: Bella
Last Name: Bartok
Email: bbartok@highility.co.intg
Phone: 781-555-9999
Extension: 5689
Fax: 781-555-8888
Job Title: Billing
Company: Highility
Department: Finance
Username: bbartok
Password: *****
Secret Question: What is your date of birth?
Secret Answer: *****

SalesLogix Profile

Username: (none) 5607
Password: (none)

Groups (1)

Group Name: User Testing group

Group Type: User

5609

Internet

Done

5601

Fig. 56